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Trade and Industry

3 March 1978

News from the Departments of Industry·Trade·Prices & Consumer Protection

Norwegian and Swedish industrialists and bankers will be urged to invest in Britain at seminars to be held in Oslo on 7 March and Stockholm on 16 March. Alan Williams, Industry Minister of State, will lead the British speakers at the seminars. He also provides the lead for *Trade and Industry*'s special report 'Go for growth : invest in Britain', published this week following page 480.

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Trade and Industry this week

OVERSEAS

Dell expects limit on car imports

It is now almost certain that the Japanese government will make a statement about the 1978 intentions of the Japanese Manufacturers Automobile Association, Edmund Dell, Secretary of State for Trade, said on Tuesday (28 February) in a BBC tv interview.

'I must emphasise', he said, 'that this is not yet certain, the thing is not yet signed, sealed and delivered. I will make a full statement when I am absolutely clear on the terms.'

Mr Dell said that he had made it clear to the Japanese on a number of occasions in 1976 that the level of market penetration should remain something less than 10 per cent. He expected that to be something the Japanese would wish to achieve, just as the UK would want them to stick to that level.

If the statement was made, it was intended to be of significant help to the British car industry and Mr Dell said, it was now of the highest importance that the British industry met the opportunity. He said that if the agreement came through in the way he hoped, there could be no more excuses about the level of Japanese penetration.

'I have made it clear to the Japanese government to the EEC and the United States that we really must have a freer market in Japan to which we can export successfully.'

Short fall in growth targets

Apart from the United States, all major countries – particularly West Germany and Japan – fell far short of their growth targets in 1977, said Denis Healey, Chancellor of the Exchequer on 28 February.

Unemployment rose in OECD countries from over 15 million to over 16 million, he told the Diplomatic and Commonwealth Writer's Association in London.

'It looks like continuing to rise this year except in the United States and, hopefully, Britain. Rising unemployment has been fuelling protectionist pressures everywhere – and here the United States is no exception.'

For 1978, he said, the OECD had forecast growth in member countries as a whole at 3½ per cent. Economies of the United States, Japan and Canada were likely to grow above this average but Europe was likely to fall below the average. Unless additional measures were taken soon there would be no chance of the community achieving the target of 4 to 4½ per cent growth this year at which it was aiming as recently as last October.

Most European finance ministers believed, he said, that although many countries could join in a collective stimulus to international demand, countries like West Germany and Japan with low inflation rates and large balance of payments surpluses could provide more stimulus than the average without creating inflationary pressures.

USSR offshore delegation in UK

Over 20 experts in the USSR offshore industry are coming to Britain next week for the oceanology international exhibition (OI '78) to be held at Brighton and Shoreham from 5 to 10 March.

The delegation will include Mr M. I. Agaphchev, Deputy Minister for the gas industry and Mr A. A. Geodetyan, Deputy Chairman of the earth science section of the Praesidium of Academy of Sciences.

Some 300 exhibitors are showing offshore equipment at OI '78, organised by BPS exhibitions.

Dell on trade visits to eastern Europe and India

Edmund Dell, Secretary of State for Trade, is visiting Romania and Bulgaria this week to discuss economic and trade issues with senior ministers. He was accompanied in Romania on 1 and 2 March by nine leading British industrialists who joined him in talks in Bucharest with Romanian ministers and officials.

His visit to Bulgaria on 3 and 4 March coincides with a visit to Sofia by a mission from the London Chamber of Commerce and Industry, who are also holding a marketing seminar there during the week.

It was also announced this week that Mr Dell is to visit India from 12 to 17 March to exchange views with senior Indian ministers on economic and trade issues, and to attend the second Ministerial meeting of the Indo-British economic committee.

During his visit, Mr Dell intends to follow up the shopping list of goods which the Indian government gave to Mr Callaghan, the Prime Minister, when he visited Delhi in January. The list includes specific items of capital equipment which Indian ministers indicated they would be interested in purchasing from Britain.

HOME

Unit pricing put on meat and cheese

A major step forward in the government's unit pricing programme took place on Wednesday (1 March) when orders dealing with meat and cheese came into effect.

Commenting on them, Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, said that unit pricing helped shoppers to make value for money comparisons and sharpened competition. He added that he was grateful for the co-operation he had received from the trade during the extensive consultations leading up to the orders.

Butchers now have to indicate the price per pound of virtually all meat in the display areas of their shops. And price per pound has to be shown for all cheese weighed in front of the customer or pre-packed in random (varying) weights.

All pre-packed cheese additionally has to have the selling price shown. Packers have agreed to standardise the weights of fixed weight packs of 11 popular varieties of hard cheeses and with effect from 1 July 1978 the unit price will have to be given for any of these cheeses sold in non-standard weights.

Programmes to help ¼m young unemployed

Two new special programmes costing around £190 million and designed to help the young unemployed and those adults who have been without a job for many months were launched by the Manpower Services Commission on Tuesday.

The first of the new programmes is the

Youth Opportunities Programme which, in a full year, will provide about a quarter of a million 16, 17 and 18 year olds with an opportunity of training and work experience, together with jobs for 8000 unemployed adults as supervisors.

The second is the special Temporary Employment Programme which, in a full year, will provide 25 000 temporary jobs for those aged 19 and over.

Both programmes are introduced at the request of the government and both have the full support of the CBI, TUC, local authorities and education service.

The programmes – which replace the existing Job Creation and Work Experience Programmes – aim to be fully operational by September this year.

'Bucket shops' subject of working party review

A working party is to be set-up to study the problems of 'bucket shops' which sell discounted air tickets. This was announced by Stanley Clinton Davis, Parliamentary Under-Secretary of State for companies, shipping and aviation, during a debate on the Civil Aviation Bill on Tuesday (28 February).

The working party, Mr Davis said, will consist of representatives of the Association of British Travel Agents, the airlines, the airline users and the Department of Trade.

'I hope to be able to make a further announcement shortly as to its terms of reference, composition and the period in which I hope their report will be available', Mr Davis concluded.

Mpg figures for new cars published

The first list of official fuel-consumption figures for new cars on sale in the United Kingdom was published on Tuesday. About 650 different models are listed.

New car dealers must have the details of test results, contained in the list, available for customers to see from 1 April. From then onwards it will be illegal for new cars to be displayed in showrooms and on forecourts unless they carry a label showing the model's official fuel consumption.

The figures must also be included in car handbooks and – if reference is made to fuel consumption – in promotional material such as advertisements, technical specifications and sales brochures. Anyone failing to observe the regulations could be liable, on conviction, to a fine of up to £400.

Dealers who are franchised to a manufacturer or importer who is a member of the Society of Motor Manufacturers and Traders (SMMT) should automatically receive a copy of the official fuel consumption list from the manufacturers who are distributing them on behalf of the Department of Energy. Those who do not receive a copy of the list by 10 March and those dealers who are in any case not franchised to a SMMT member have been advised to write to the Information Division, Room 1387, Department of Energy, Thames House South, Millbank, London SW1P 4QJ.

Deputy chairman appointed for NEB

Richard Morris has been appointed deputy chairman of the National Enterprise Board by Eric Varley, Secretary of State for Industry, it was announced on Tuesday. The post has been vacant since Sir Leslie Murphy's appointment as chairman of the National Enterprise Board, in succession to Lord Ryder, on 1 August last. Mr Morris, age 52, will join the board on secondment from Courtaulds Ltd, where he is a director, for four years starting on 10 April next. He is a chemical engineer by training but has held a wide range of management positions in Courtaulds, some at factory level and some at headquarters. Mr Morris is a director of British Nuclear Fuels Ltd, a member of the Advisory Council on Energy Conservation, and the current president of the Institution of Chemical Engineers.

Action to reduce tea prices

Tea prices are to be reduced by statutory action. This follows a failure to reach agreement between tea blenders and Roy Hattersley, Secretary of State for Prices and Consumer Protection. Statutory consultations on a draft order under the 1974 Prices Act began on 27 February.

If fully reflected in retail prices, the 5p reduction in blenders' prices specified in the order would reduce retail prices to the levels recommended by the Price Commission, for example, 21p to 22p per quarter for medium priced teas. Discussions will be held with organisations representing the retail trade to ensure that such reductions are fully reflected in prices in the shops.

In order to end uncertainty in the trade quickly, comments on the draft order are being asked for by Tuesday, 7 March. Subject to the outcome of the consultations it is intended that the order should be made in two weeks' time.

Use of government schemes increases investment

Evidence of a growing confidence on the part of industry itself to invest is seen by regional director, Albert George, of the Department of Industry's West Midlands Office, in the number of firms taking advantage of government schemes to stimulate investment. So far, 186 offers have been made totalling £30.5 million towards projects in the region costing £178 million

Schemes aimed at industries well represented in the region, such as machine tools and foundries, have done particularly well. A number of companies have completed, or are well on the way to completing, projects for which money has been provided.

Mr George drew attention to the nearness of the closing dates of some of the current sectorial schemes: 30 June for the £23 million paper and board and paper making machinery scheme; 31 July for both the £20 million non-ferrous foundries and £20 million instrumentation and automation schemes; and 31 December for the £5 million drop forging scheme. Industry is reminded that the £125 million selective investment scheme also closes on 30 June.

Applications for the ample funds still available should be made to the department's regional offices.

Welsh coal price margins under review

Roy Hattersley, Secretary of State for Prices and Consumer Protection has decided against imposing particular maximum margins on coal prices operating in west Wales. His decision follows careful consideration of a report, published by the Price Commission on Monday, and the representations he had received from the coal merchants concerned.

He had noted that prices in the area – which are high, relative to other parts of Wales – may have been fixed on the basis of prepared lists. As the main selling season for coal is now almost over and as coal prices will have to reflect other increases in costs since the report was prepared, it would have been difficult for him to impose restrictions on the margins of the coal merchants concerned between now and October 1978 that could be relied upon to reduce coal prices to the consumer.

The Price Commission report, Margins of Coal Merchants in West Wales is obtained from HMSO, price 45p.

He has been informed that the Director-General of Fair Trading has already begun inquiries into the possible existence of an unregistered restrictive agreement under section 36(1) of the Restrictive Trade Practices Act.

Home news

New consumer advice centres to be opened throughout UK

Government grants totalling £300,000 are to be provided to set up 26 new consumer advice centres throughout Great Britain, said John Fraser, Minister of State for Prices and Consumer Protection, on 22 February in reply to a parliamentary question (see page 471).

The new centres are in addition to 105 already open, two of which also receive improvement grants under the new scheme. Most of the grants will go to local authorities, but centres to be set up by local consumer groups and citizens advice bureaux will also benefit.

Consumer advice centres offer advice to shoppers – and traders – on consumer rights. Many also offer 'pre-shopping' advice on the range of products and services available, and the various means of obtaining them.

Speaking at the Southwark Consumer Advice Centre, Mr Fraser said the government's policy was to bring both prices and unscrupulous trade practices into line. Single-figure inflation and treble-figure consumer advice centre coverage were proof of its success. The enormous response received for this grant scheme refuted those who denied the value of consumer advice centres. The centres met a real need to help shopper and shopkeeper alike. The new grants were an important step towards a comprehensive national consumer advice service.

Ban confusing bargain offers – Borrie

Misleading bargain offer claims which the shopper cannot easily check should be prohibited by law, said Gordon Borrie, Director General of Fair Trading, in a recommendation to Secretary of State for Prices and Consumer Protection, Roy Hattersley.

The recommendation, the first to be made under section two of the Fair Trading Act – urges government action to prohibit the use of those claims which may mislead or confuse consumers or are irrelevant to their purchasing decisions – such as 'Today's value £42.50, only £27.50', 'Elsewhere £10, our price £8.50', or Up to 40 per cent discount'. Certain types of bargain offer claims are, however, excluded from the proposed prohibition as likely to be helpful to consumers. An outright prohibition is recommended on 'worth and value' claims, 'price elsewhere' claims and 'up to' offers where the reduction claimed is quantifiable.

Helpful bargain offers

Mr Borrie has suggested that traders should be allowed to make bargain offer claims where the statement of a higher price or charge is likely to be helpful; for example, that a trader's price is lower today than it was last week, that the unit price for three items is less than one, that brand X is cheaper than brand Y, or that trader A's price is less than trader B's – always provided that the claim is true and its meaning is clear. But he recommends that the use of such offers to mislead should be a criminal offence unless it is already unlawful.

Common characteristic

Mr Borrie pointed out that all the claims which he had suggested should be prohibited had a common characteristic – their meaning and justification were not clear to the consumer. With 'worth and value' claims, for example, the consumer was faced with an unexplained and possibly entirely subjective assertion that the trader was offering a bargain – although the bargain was represented as being carefully quantified.

Indirect effect

He added that a potentially serious indirect effect was that, if consumers experienced fake bargains, they would begin to suspect all bargain offers and therefore miss out on the genuine reductions. 'It is also possible that there can be escalation of claims so that traders begin to compete with each other in price reduction claims instead of in actual prices. That situation simply leads to higher prices.'

Assurances given on caravan sites

Assurances on the leasing of sites for holiday caravans have been given to John Fraser, Minister of State for Prices and Consumer Protection, by Mr S. V. Dunstan, managing director of Trellis Scott and Whiteford Bay Holiday Estates.

Details of the assurances were given by Mr Fraser in a written reply on 23 February (see page 471), following representations to the minister from members of parliament, the Welsh Consumer Council and many others about certain aspects of the lease offered to licensees at the Dinas Country Club and Caravan Park in Dyfed, Pembrokeshire, which Mr Dunstan's company recently took over. Particular complaints had been made about the short notice given to licensees as to whether to accept the terms of the lease.

Mr Fraser said he would be keeping the matter under review.

Price Commission consults employers before unions – Williams

When making one of its investigations into a firm or an examination of an industry, the Price Commission would always inform employers before approaching the trade unions concerned, Price Commission chairman Charles Williams, told the Confederation of British Industry on 23 February.

Speaking to a seminar at CBI headquarters in London Mr Williams said 'there had been, and no doubt would continue to be, occasions when the commission would wish to be in touch with trade unions representing those employed by companies under investigation or forming part of a sectoral examination. The commission felt that it was part of its duty to involve trade unionists, as well as employers and consumers, in what it did.

'We have had talks with the TUC and have agreed that the best procedure is for us, at an early stage of an investigation, to ask the company for a list of unions with negotiating rights in the part of the business concerned. We then normally write to the general secretary of each union and to the secretary of the joint union machinery, where this operates, to inform them that an investigation had started and to ask them to nominate an official with whom the commission could get in touch directly if this seemed desirable.'

He emphasised that the commission would always give notice to the employer before contacting the nominees of the unions in question. In the case of sectoral examinations, it would work with trade associations and TUC committees to obtain lists of the principal unions concerned. 'Here again, we will take care to keep employers informed wherever practicable of any approaches we make.'

Thames Water charges to be investigated

Increased charges proposed in January by the Thames Water Authority are to be investigated by the Price Commission, it was announced on 17 February. The commission decided the proposed increases should be the subject of an investigation under section 4 of the Price Commission Act 1977. The Secretary of State for Prices and Consumer Protection was notified of the commission's intention.

The effect of the decision to investigate is that the increases proposed may not be

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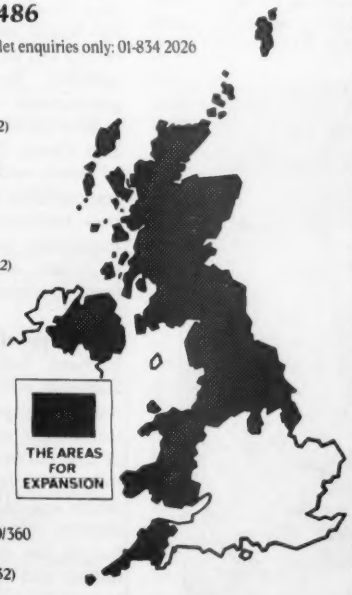

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implemented during the period of the investigation which must be completed by 23 May. But the commission is able to allow interim increases, and is obliged to do so to the extent to which the safeguard provisions operate.

Anyone who wishes to make any representations to the Price Commission in connection with this investigation should write to the Secretary, Price Commission, Neville House, Page Street, London SW1P 4LS.

Varley in Speke talks with BL unions

Secretary of State for Industry, Eric Varley, met national officials of trade unions representing the British Leyland workforce at their request on 23 February to discuss the company's announcement concerning the proposed closure of the no. 2 plant at Speke.

The trade union representatives expressed their grave concern about the company's announcement and asked the secretary of state to intervene to ensure that the company reconsidered the matter.

Whilst sharing the concern of the trade unions about the level of unemployment in Merseyside, Mr Varley told union officials that the means for achieving reductions in capacity were matters for management decision by British Leyland in consultation with the National Enterprise Board. He suggested that trade unions' officials should contact British Leyland management urgently to pursue the discussions about the proposed Speke closure which the management had requested.

Sheet metal firm to expand at White Lund

Shermaynes (Welders and Engineers) Ltd, has occupied terrace unit premises of about 700 m² built by the English Industrial Estates Corporation for the Department of Industry at White Lund, Morecambe, in Lancashire.

The company was established 16 years ago and currently occupies premises of 1340 m² on the White Lund industrial estate where it produces steel pallets and general sheet-metal. Unable to extend its present factory, the company requires additional space to expand production.

NEB invests in Power Dynamics Ltd

A total of £180,000 has been invested in Power Dynamics Ltd by the National Enterprise Board which has subscribed £60,000 for new ordinary shares representing one-third of the enlarged equity and £120,000 for 120 000 6½ per cent cumulative redeemable participating preference shares 1982-85.

Power Dynamics manufactures hydraulically-operated tube and pipe bending machinery which will handle tubes and pipes of up to 300 mm diameter. The machines are used in nuclear power engineering, chemical plant manufacture, and shipbuilding. About half of turnover is exported, directly or indirectly.

The new capital is to finance the expansion of the company's manufacturing facilities.

New mid-Wales factory programme announced

Chairman of the Development Board for Rural Wales, Emrys Roberts, has announced that the board is to buy land for industry at eight places in mid-Wales and is to build 13 factories providing 6300 m² of new factory space.

The programme, announced on 20 February and approved by the secretary of state, covers factories at Cardigan, Lampeter, Tywyn, Brecon, Ystradgynlais, Machynlleth and Welshpool.

Small firms enterprise in northern region

Known as 'new enterprise development', a project aimed at encouraging the development of small new businesses in the north was inaugurated on 24 February. Based at Durham University Business School, and backed by the Department of Industry, the Joseph Rowntree Charitable Trust and ICI, the new project will also receive short-term research and administrative support from the Manpower Services Commission.

A team of five, with secretarial and administrative support, will undertake a variety of liaison, research, counselling, training and education, public relations and administrative activities designed to increase awareness of the problems and opportunities for new firm development in northern region. Over the initial three-year period of the project, results will be disseminated to other parties in industry, the professions, education and government.

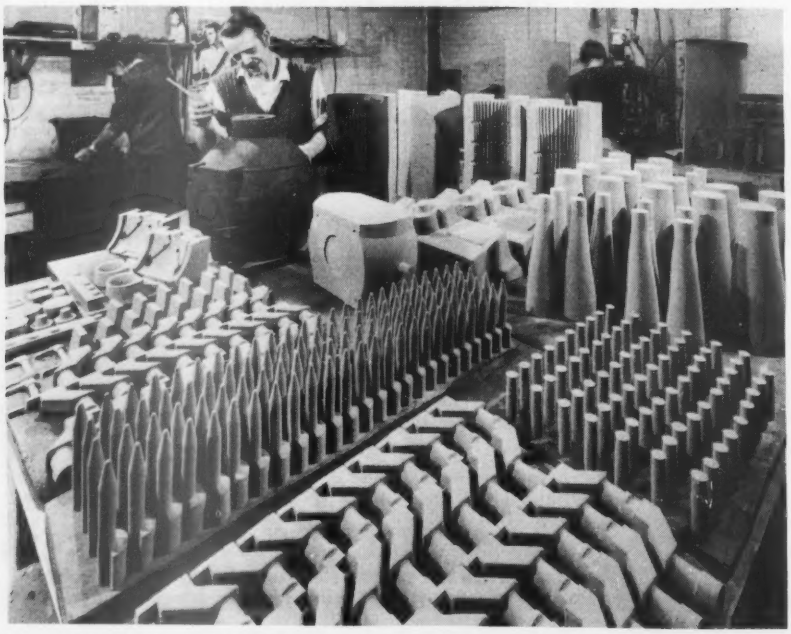
In a message to Durham Business School Bob Cryer, Parliamentary Under-Secretary of State, said that as minister with special responsibility for small firms, he welcomed the new initiative. 'I am sure it will play an important part in the creation of new businesses and in strengthening the small firms community in the northern region.'

Tradition of achievement

Richard Sutton, director Department of Industry, northern region, speaking at the inauguration said the north-east already had a tradition of achievement in the development of new enterprises. His department was glad to be associated with this exciting new venture which was likely to produce results and conclusions relevant not only to the north-east but to the country as a whole. It was a further and bigger step along the path which 'enterprise north' had been treading, with its voluntary panels of businessmen which now had a proven record of encouraging and assisting people to develop good basic ideas into sound viable businesses.

British-made castings go overseas

Sand cores required in the casting of complicated aluminium components for the electronics and instrumentation industries being prepared for use at the Sandy, Bedfordshire, foundry of RKB Precision Products. RKB recently completed urgent air-freight orders for 400 castings for sophisticated electronic equipment for IRD Mechanalysis of Columbus, Ohio, and 500 industrial gauge castings for Baker Hortsmann Mercer of Bombay.



Public transport top priority – Rodgers

The maintenance and improvement of public transport is the government's number one priority in transport, said William Rodgers, Secretary of State for Transport, on 16 February. In a speech to the Confederation of British Road Passenger Transport, he pointed out that 'future generations would never forgive us if we allowed public transport to deteriorate to the point of effective extinction. But without government intervention and financial help this could happen'. It could no longer be assumed, he said, that essential services would be maintained either directly on the basis of revenue collected from fares or indirectly through cross-subsidisation.

Mr Rodgers explained that the government had decided to maintain a national network of railways and recognised that this would involve a substantial subsidy as long ahead as could be seen. Similarly, it was also now clear that essential bus services could not be maintained unless there was a substantial degree of revenue support.

'Exactly how the money should be spent must remain a matter for local decision,' he added. 'In this respect the organisation of public transport is properly a matter for locally elected representatives'. But by deciding to allocate very substantial sums of money – running this year to £150 million – to the maintenance of bus services, the government had made a major decision of principle.

'Of course there must be a ceiling to total expenditure on public transport: it is set out annually in the government's white papers on public expenditure. But within that ceiling I want to see the money fairly shared. I need to be sure for example that proposals for revenue support take account of the need to achieve a high level of productivity and the fact that fares should reflect increases in costs.

'What I want is a partnership, both between central government and local government and between local councils and the operators.'

Knitting SWP's progress report published

The progress report of knitting sector working party to the National Economic Development Council was published on 23 February. It was considered along with reports of the other sector working parties taking part in the Industrial Strategy, at the NEDC meeting on 1 February.

Copies are available free from Nedo Books, 1 Steel House, 11 Tothill Street, London SW1 9LJ.

Bankruptcy records for England and Wales

Details of bankruptcies in England and Wales are maintained in a public search room at Room 901, Thomas More Building, Royal Courts of Justice, Strand, London WC2A 2JY.

Searches can be made personally or by an agent and a fee of 25p in respect of each bankruptcy inquiry is payable at the time.

Undersea coal prospect in next century – Eadie

Coal industry frontiers could be substantially extended by undersea coal seams, said Alex Eadie, Parliamentary Under-Secretary of State for Energy, on 17 February.

Speaking after a visit underground at the Lynemouth and Ellington Colliery, near Newcastle-upon-Tyne, he explained that the prospect of exploiting the seams which had been discovered during North Sea oil drilling operations could be foreseen 'as we look into the twenty first century'. The North Sea coal seams, up to 15 m thick in places, had been discovered between 600 and 3400 m below sea level. Such deposits were too far from the shore, and at too great a depth for their extraction by conventional methods.

He pointed out that the winning of these potentially valuable resources presented a daunting technological challenge, and scientists and engineers were already starting to think about ways to tap them.

Energy managers need more support – Cunningham

Britain's energy managers are in the forefront of the nationwide campaign to get energy productivity on the move in the UK but they must have more support from top management, said John Cunningham, Parliamentary Under-Secretary of State for Energy, on 21 February. He was addressing the inaugrual meeting of Britain's newest group of energy managers – the south Hertfordshire group – at John Laing Research and Development Ltd in Borehamwood. There are now about 25 such groups and over 3000 energy managers throughout the country.

Growth in industry

Dr Cunningham told his audience that energy management had become a major growth industry of national importance. Energy managers represented a new industrial force in mobilising energy saving on the ground, in getting a million and one decisions made on using energy more effectively.

Support on all flanks

'But energy managers cannot work alone. Just like all those at the front, they need support on all flanks. And although the government strongly backs the energy manager there is no substitute for commitment and support from – and indeed, access to – top management in the firm. He also needs to seek support from the ranks – from those on the shopfloor.

He pointed out that top people in industry should recognise that energy prices were on the up and up – and were expected to at least double in real terms in the next couple of decades. If energy was not a substantial cost now it was certainly likely to become so, and energy inefficiency now would mean paying the price in lost markets and reduced exports in the future.

First combined heat and power scheme approved

Tony Benn, Secretary of State for Energy, has approved the first combined heat and power scheme to be proposed by an area electricity board. The new diesel-fired station, which will be built for the Midlands Electricity Board at Moorfields in Hereford, will provide heat in the form of steam and hot water to neighbouring firms and electrical power to the board's distribution system.

Using the total energy concept, the scheme will make maximum use of the energy content of the fuel oil. The electrical output of the diesel generators will be about 15 MW and will be fed into the board's 11 kV underground system. The waste heat produced by the generators will be supplemented as necessary by conventional oil-fired boilers and sold.

The overall thermal efficiency of the combined heat and power scheme is expected to be around 76 per cent compared with about 30 per cent from the generation of electricity alone. The station has been designed to achieve as near automatic operation as possible and will cost approximately £3.5 million at 1976 prices.

North Sea production reaches new high

Average daily crude oil production from the UK sector of the North Sea during January was 884 823 barrels compared with 851 102 barrels per day in December.

Production for the month was 3 674 322 tonnes, 142 516 tonnes up on December.

Further area of UK continental shelf designated

A further area to the north-west of the Shetland Islands has been designated as one in which the UK's right to the sea bed and subsoil and its natural resources may now be exercised, said Dr J. Dickson Mabon, Minister of State for Energy on 16 February.

Replying to a parliamentary question, Dr Mabon said that the additional 2990 km² of the continental shelf had been designated by

an order in council made on 9 February. He explained that the areas now designated, which were adjacent to existing designated areas, were available to holders of petroleum exploration licences. The designation order also increased the area of continental shelf in respect of which he was able to grant petroleum production licences.

New orders on redundant mineworkers' payments and NCB grants

Two draft orders concerning payments to redundant mineworkers and grants to the National Coal Board (NCB) were laid before parliament on 15 February.

The Redundant Mineworkers and Concessionary Coal (Payments Schemes) Order 1978 will, subject to parliamentary approval, extend schemes which provide for the payment of benefits and the provision of concessionary coal to redundant mineworkers and other coal industry employees, who are made redundant between 25 March 1978, and 29 March 1981. The order comes into operation on 25 March, and extends for a further period schemes first established in 1967 and 1973.

The second order, the Mineworkers Pension Scheme (Limit on Contributions) Order 1978 will, if parliament approves, authorise the secretary of state to compensate NCB for expenditure incurred in reducing or eliminating the deficiency in the mineworkers pension scheme related to pre-April 1975 pensioners, to a maximum of £34 million. The order comes into operation on 20 March.

Computer study on prescription pricing

In a joint study the Department of Health and Social Security and the Prescription Pricing Authority are to find out if it is possible to devise satisfactory cost-effective methods of capturing data from prescription forms.

The study has been authorised by David Ennals, Secretary of State for Social Services, following the recommendation in the Tricker Report ('Inquiry into the Prescription Pricing Authority are to find out if it is possible to devise satisfactory cost-effective methods of capturing data from prescription forms.
vided to enable the Prescription Pricing Authority to cope with a continually increasing pricing workload and to permit use of its unique data bank of information on prescribing practice and drug usage.

Simpler health checks on ships arriving in Britain

New, simpler seaport procedures for the health clearance of ships arriving in Britain, which come into force on 1 April, are expected to result in a faster turn-round.

A circular setting out the changes was sent to port health and local authorities on 16 February and amending regulations will be laid before parliament. A new form (form port 38) setting out the changes is being distributed to ships masters (through customs officers and shipping companies) and to port health and local authorities from about 1 March.

US advance booking charters rules relaxed

Rules governing advance booking charters to the United States originating in the UK have been relaxed by the Civil Aviation Authority.

The advance booking period, previously a minimum of 45 days, has been reduced to 30 days, while the minimum-stay period, previously 14 days in the summer and 10 days in the winter, has been changed to seven days all year round. The changes came into effect on 20 February.

New patent rules published

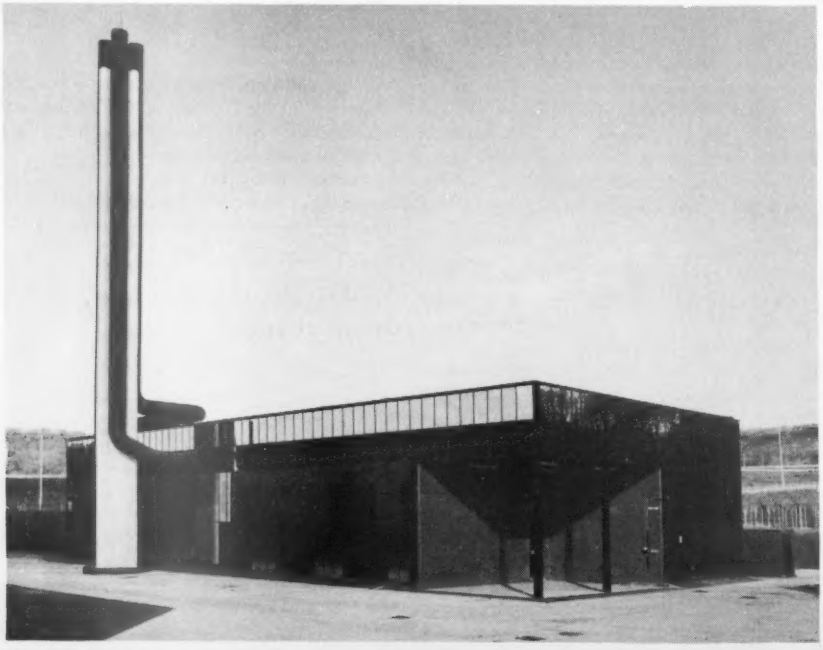
New patent rules associated with the new UK Patents Act which comes into force on 1 June this year were published on 27 February.

The new act, which received royal assent (*Trade and Industry*, 5 August 1977, page 217) on 29 July last year, substantially revises the patent system to bring it into line with modern trends, streamlining the procedure for obtaining patents and taking account of international developments.

The rules, (SI no. 1978/216), which, like the act, enter into force on 1 June, will be available, price £1.60 net (plus postage) from Sale Branch, The Patent Office, St Mary Cray, Kent; Sale Counter, The Patent Office, 25 Southampton Buildings, London WC2A 1AY, and any branch of HMSO.

Pollution control at Cardiff's new Radiochemical Centre

Two Danks of Netherton metric dual-fired boilers have been installed at the new Radiochemical Centre laboratory located just outside Cardiff. Strict control of pollution has been achieved from the boilers, which burn either fuel oil or natural gas. Each boiler has a capacity of 9000 kg per hour of steam at 8½ kg/cm².



Finance for technology

The National Research Development Corporation provides financial and other support for technological developments of potential commercial importance. NRDC promotes the adoption by industry of new products and processes invented in government laboratories, universities and elsewhere. NRDC is participating in joint ventures with industry on an increasing scale. The corporation welcomes submissions in confidence from firms who have promising new projects to launch in any branch of industry or commerce. The conditions for its considering proposals of this kind are set out in a leaflet which may be obtained on application, either by writing to the National Research Development Corporation, Kingsgate House, 66-74 Victoria Street, London SW1E 6SL, or by telephoning 01-828 3400.

MMC reference laid aside

With the abandonment of the acquisition by Rheem International of Redfearn National Glass, the Department of Prices and Consumer Protection has given consent to the Monopolies and Mergers Commission to lay aside the reference made to them on 22 September 1977 (see *Trade and Industry*, 14 October 1977, page 66).

Merger proposals cleared

Secretary of State for Prices and Consumer Protection, Roy Hattersley, has decided, on the information at present before him, not to refer the proposed merger between Dalgety and Federated Chemical Holdings to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Tax deposit interest up

From 20 February the rate of interest on new deposits accepted under the terms of the prospectus (series 2) for certificates of tax deposit dated 11 October 1976 and applied in the payment of tax will be increased from 6 per cent to 7¼ per cent. The rate of interest on deposits withdrawn for cash will be increased from 4 per cent to 4¾ per cent.

Certificates of tax deposit are operated by Inland Revenue, and deposits may be made at Inland Revenue tax collecting offices throughout the UK. The scheme is available to taxpayers generally for the payment of tax. The certificates are available against tax generally – that is including income tax (other than Paye and tax deducted from payments to sub-contractors), corporation tax (including advance corporation tax), capital gains tax, capital transfer tax and petroleum revenue tax. Deposits earn interest for a maximum of six years.

Official appointments

Trade marks committee. Secretary of State for Trade, Edmund Dell, has appointed Mr M. D. Snoxall as chairman of the Standing Committee on Trade Marks. Mr P. Egerton-Vernon has been appointed to the committee to represent the Law Society. Mrs A. M. Thomas, who was appointed as a member of the National Consumer Protection Council, now represents in addition Consumers' Association and the National Consumer Council. Mr R. A. Kaner has been appointed as an additional member to represent the Committee of Marketing Organisations and the Incorporated Society of British Advertisers Ltd.

Patents endorsed 'licences of right'

Under section 35 of the Patents Act 1949 the following patents were endorsed 'licences of right' on the dates specified.

16 February 1978

1420037 Societa Italiana Resins SIR SpA
Process for the simultaneous separation of ethylene oxide and carbon dioxide from the gaseous mixtures obtained in the direct oxidation of ethylene with oxygen

1434778 Societa Italiana Resine SIR SpA
Process for the preparation of catalysts suitable for the homopolymerization and copolymerization of olefins

1178120 Noranda Mines Ltd
Apparatus and process for the deoxidation of a molten metal

1263893 Societe Anonyme Automobiles Citroen
Improvements in steering assemblies for motor vehicles

1300843 Agfa-Gevaert Aktiengesellschaft
Process and apparatus for the reproduction of photographic originals

1387598 Jeremiah Quinlan
Sciatica cure

1415457 Wilfred Ernest Gale
Machines for shearing or punching sheet metal

1432956 Rubery, Owen and Co Ltd
Trailers

1473168 Bayerische Motoren Werke Aktiengesellschaft
Induction pipe systems of internal combustion engines

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which the claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on patents form no. 45 within two months after the date of endorsement. I. J. G. Davis, Comptroller

Government sales

15 March 1978 – Miscellaneous

Location
Bristol Euro Crest Hotel, Filton Road, Hambrook, Bristol

Auctioneers
Russell Baldwin and Bright (Dept L), 19-21 King Street, Hereford (tel. 0432 55441)
Stores lying at Regional Depot Hereford and other places, comprising furniture, aircraft spares, clothing and textiles, 17 000 blankets, tyres, a few vehicles and other items.

21 March 1978 – Miscellaneous

Location
The Embassy Suite, Balkerne Lane, Colchester, Essex

Auctioneers
Fenn Wright Garrod Turner (Dept L), 146 High Street, Colchester (tel. 0206 46161)
Stores lying at depots in Kent, Essex and East Anglia, including clothing, furniture, householdware, binoculars, engineering and hand tools, electronic equipment, tyres, 26 Minis, some other vehicles and miscellaneous items.

Catalogues which give details of the lots, conditions of sale, viewing times, etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 40p, postage 15p (postal orders only).

WEMBLEY AUCTION SALES 1978

7 March 1978

View Days: Day preceding and morning of sale

Location: Department of the Environment
Property Service Agency
Supplies Stores
India Pavilion
Exhibition Grounds
Wembley, Middx.
Tel. 01-903 2508

Description of Goods: Office and Miscellaneous furniture etc.

Auctioneers: Messrs. Hollingsworths
Westcombe House
56/58 Whitcomb Street
Leicester Square
London WC2H 7DR
Tel. 01-839 1875

Potential buyers are advised to refer to the official catalogue available direct from the auctioneers price 10p

New products

Lightweight plywood introduced

Thames Plywood Manufacturers, Barking, Essex, has introduced a new lightweight, decorative-faced plywood.

The lighter weight of Thames Ribbonply, which has a 1.5 mm sapele face, makes it especially suitable for use as decking in the manufacture of sailing dinghies, an area of increasing demand.

The use of a gaboon core and gaboon back are important factors in determining the lighter weight of Ribbonply which is available in 4 mm and 5 mm thicknesses. Standard sheet size is 8 by 4 ft.

Further information: circle 426

Low-cost housing for short-stay contracts

Wyseplan of Chawston has developed a low-cost accommodation range to serve the short-term housing needs of resident workers, and their families, through short-duration contracts and initial mobilisation periods. The units also provide self-contained batchelor facilities for two, four or six men.

Although the cost of the new house has been reduced to a minimum, the company says, the standard of the internal layout is high. Two- and three-bedroom versions will be available with fully equipped kitchen, bathroom and shower facilities.

The house is well insulated, re-locatable and requires minimal concrete strip foundations. Packed two per 12 m trailer for ease and economy of shipping, the units can be quickly erected for immediate use.

Further information: circle 427

BOC launches new Portapak

BOC Ltd, Gas Equipment, has launched a new version of Portapak, a completely portable, go anywhere, cutting and welding equipment.

After trials with the existing equipment, three major improvements have been made to the design of Portapak.

These include a new finish to the trolley, which now has an epoxy resin finish replacing the stove enamel finish of the previous set.

A tool box has now been built into the trolley so that all the equipment necessary to tackle a wide variety of welding and cutting obs can be carried with Portapak.

A new type electronic sparklighter is supplied with Portapak. Field trials have shown that this lighter is more reliable and less susceptible to damp conditions than the conventional sparklighter previously supplied.

Portapak is supplied complete with regulators, cutting and welding attachments, goggles, sparklighter, spanners, a multipack of welding rods to tackle a wide range of applications, hoses and a handbook of operating instructions.

Optional extras include extra cutting and welding attachments so that Portapak can be used to weld and cut thicker materials.

The weight of the unit including all attachments supplied is 32 kg.

Further information: circle 428

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Crystal filters from Marconi

A new range of high-performance 1.4 MHz crystal filters has been developed by the specialised components division of Marconi Communication Systems, a GEC-Marconi Electronics company.

These filters, the F2300 series, operate at a frequency of 1.4 MHz with pass-band widths from 50 Hz to 8 kHz and various shape factors. Narrow bandpass, dsb, usb and lsb are all available and most types have four options of termination: 50 ohm, 75 ohm, 150 ohm and 1 kilohm. An important feature of the series is the small size of the units, 76 by 27 by 30.5 mm.

The company says the filters combine high-quality with reliability even under extreme environmental conditions. Many have been designed to conform to MPT 1201.

Further information: circle 429

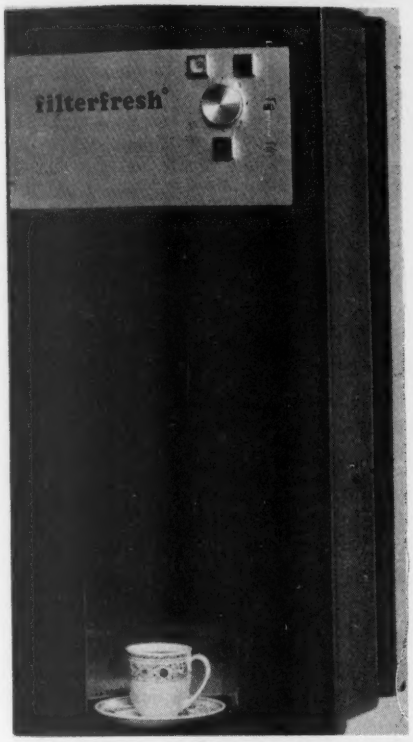
New valve operators

A new range of interchangeable mechanical operators that can be used with both Euroline 'M' and 'H' valves without any adaptation has been introduced by Austing Beech of Leighton Buzzard. The company says the operators can be simply added to the already established direct solenoid, solenoid pilot and air pilot valves.

The operators can be supplied in both kit form and complete with valves. Most types of operators are available including push buttons, selectors, hand levers and cam levers. All operate a wide variety of valves.

Further information: circle 430

Office coffee



Continental coffee for the office at the touch of a button is Breakmate Bevolux's claim for its new coffee machine. Called 'Filterfresh' the system produces coffee, freshly filtered for cup or coffee pot. The secret, the London company says, is that after intensive mixing of fresh-ground coffee and hot water the infusion is drawn through filter paper by a vacuum process which achieves the full flavour of the coffee.

Further information: circle 431

Avo complete multimeter range with clampmeters

Avo announces a range of clampmeters that complete its range of analogue and digital multimeters that sell under the Avometer name.

With the clampmeters, ac current may be measured, wherever a single conductor is available, without the need to break the circuit, and the measurement can be taken in complete safety.

The clampmeters also have other voltage and resistance ranges making the instrument into a complete multimeter for the electrician or engineer.

The range consists of two models, the Clampmeter 300 for current measurement to 300 A on the highest scale, and the Clampmeter 1200 for current measurement up to 1200 A.

The instrument may be operated using one hand only, and is suitable for use in either the left or right hands.

The instrument complete with all its accessories is supplied in a sturdy pvc carrying case.

Further information: circle 432

Technology news

PO to set up fault-finding centres

In its drive to improve Britain's telephone service, the Post Office has bought a system of 61 maintenance and analysis centres (MACs) within the aim of reducing telephone faults dramatically by spotting them automatically and alerting engineers to deal with them more quickly.

The MAC system was announced by Peter Benton, managing director of Post Office Telecommunications, when he confirmed a £3 million order last month for 52 GEC 2050 minicomputers which will form the MACs' 'brains'.

All but one of these small computers will be used in the 51 maintenance and analysis centres due to come into service in the early 1980s. This follows successful experience with 10 MACs which will be fully operational by the end of this year. The additional 2050 computer will be used for training staff in MAC operations.

The task of each MAC is to send test phone calls – at a rate of about 20 per minute spread over all the exchanges in its locality – throughout Britain's telephone network, and keep a record of what happens to them. If they do not get through because of a fault, the MAC traces the location and immediately alerts engineers to put things right.

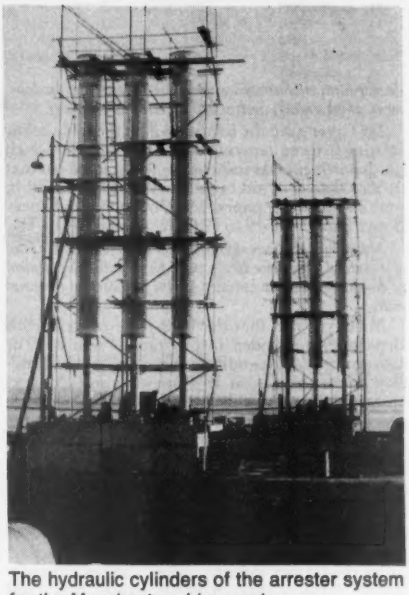
The calls are made to numbers specially allocated for MAC's exclusive use on each exchange in the UK with more than 1000 lines – some 3000 exchanges in total. Test calls will not be made to customers' numbers.

Test lines

Every two hundredth line in the telephone exchanges tested by the MAC is allocated for test purposes. These lines are connected to test equipment which responds to calls from the MAC. If the call goes through, this equipment will tell the MAC that the connection is working satisfactorily. But the MAC will also identify situations which prevent calls getting through – for example, number unobtainable, equipment occupied, incorrect routings, faulty plant or no sound at all.

The MAC operates at its maximum calling rate from 0800 to 1800 each day and then at a reduced rate until 2100, when it shuts down for the night. It starts again at 0400 the following morning, and spends the next four hours in checking itself, to make sure everything is in working order for the start of its next 13-hour stint.

'Maintenance and analysis centres were devised by the British Post Office and we believe the system to be superior to anything comparable elsewhere,' Mr Benton said. 'For this reason they will have considerable export potential. No other system for making test phone calls is as advanced, or offers so many facilities'.



The hydraulic cylinders of the arrester system for the Manchester ship canal.

Ship-arrester system installed

BHRA Fluid Engineering has recently completed its part in the design, development and installation of a novel ship-arrester system. The system is designed to prevent vessels colliding with the sea-lock gates on the Manchester Ship Canal. BHRA has worked in collaboration with the Manchester Ship Canal Company and their civil engineering advisers, Coode and Partners of London.

What was needed was a system that could bring a ship of up to 20 000 tonnes to a stop within 14 m from speeds approaching three knots. The objective was to avoid damage to lock gates and vessels, and to eliminate the consequential losses which could result if the canal were out of action for repairs.

In solving the problem, no new technology was required; the answers were found by using well-known principles in a new way.

The arrester design uses large hydraulic cylinders mounted vertically in pairs, one on each side of the lock. The installation on the Manchester ship canal's Eastham lock employs three pairs of these cylinders.

The most important feature of the design is the use of cables within telescoping rods, rather than the conventional ram and cylinder arrangement. This reduces the height of the installation, and the cost of the structure as a whole. Even so the individual cylinders stand at nearly 13 m from their foundations; 9.15 m being taken up by the stroke length.

In the rest position, the pistons are at the tops of the cylinders down which they are drawn by cables which straddle the lock. Apart from a special connect/disconnect fitting which allows ships to pass, the cables run without interruption from one arrester cylinder to its companion on the other side of the lock.

At Eastham, three such cable connections, suitably guided, are combined to form an arrester strop or lattice which, in the ready condition, lies across the lock.

If a ship collides with this lattice, the pistons are pulled downwards and hydraulic fluid is expelled through a sequence of different sized holes, so designed to provide specific deceleration characteristics.

Using a computer program developed at BHRA, the effect of different ships colliding with the arrester lattice was simulated to determine the loading characteristics.

The system will not only deal with the largest vessels specified but will also stop smaller ships which could hit the absorber ropes obliquely or close to the lock side.

IUE seeing stars

All systems are working well on board the international ultra-violet explorer (IUE) satellite launched from Cape Canaveral on 26 January.

The first stellar spectrum, obtained on 7 February, was of the calibration star *eta* Ursis Major in the 'handle' of the Plough. With this bright star and the fainter AO-p observed on the following day both the long and short wavelength spectrographs have been shown to be working well in both high and low dispersion modes using large and small-entrance apertures.

The IUE project is sponsored by the National Aeronautics and Space Administration (Nasa) in the United States, the European Space Agency (ESA) and the Science Research Council (SRC) in the UK.

In the UK, the IUE project is a collaboration between SRC's Appleton Laboratory near Slough and the Department of Physics and Astronomy at University College London and is funded mainly by the SRC.

Division of responsibility

The Appleton Laboratory was responsible for overall UK technical, programme and financial management and liaison with Nasa's Goddard Space Flight Center and the European Space Agency, undertook development of image correction and calibration computer programs. The laboratory was also responsible for the management of industrial contracts placed by the UK – where the work was led by Marconi Space and Defence Systems Ltd, Portsmouth, in the role of prime contractor with responsibility for design, development and test of the uv detector cameras.

University College London, with the assistance of staff seconded from the Appleton Laboratory, undertook detector-tube evaluation and optimisation of operating parameters, provision of a vacuum-optical calibration facility and operating computer programs, telescope light-baffle efficiency assessment, development and testing of procedures for ground and in-orbit optimisation and calibration of cameras, conduct of life tests on detector tubes and scientific support to Goddard Space Flight Center.

Parliament

Monday, 20 February

Applications for ERDF aid

Robert Woof (Blaydon) asked a number of questions about applications for aid from the European regional fund.

Mr Cryer replied that during 1975-7, the first three years of the operation of the European regional development fund (ERDF), up to 1600 and 700 infrastructure projects had been mentioned by local authorities and public agencies respectively to the departments concerned with preparing applications as possible candidates for fund assistance. During the same period applications were made to ERDF in respect of 562 local authority and 220 other public agency infrastructure projects, for which aid was sought for £30 million and £49 million respectively. Industrial projects were generally identified by departments, including the Department of Industry, from amongst those receiving regional aid and applications were prepared in consultation with the companies concerned. The total value of the ERDF contribution towards the cost of UK projects approved by the European commission in 1975-77 was £150.4 million. Of this £61.5 million related to industrial projects, £13.1 million to government advance factories and £75.8 million to infrastructure projects undertaken by local and other public authorities.

Mr Woof also asked what proportion of the applications for aid from the European development fund fell primarily into each of the following categories: advance factory building, infrastructure improvements, retraining and aids towards autonomous regional long-term development.

Mr Cryer said that applications to the European regional development fund submitted to the commission in the period 1975-77 resulted in a total commitment of ERDF contributions to UK projects of £150.4 million. Of this: 9 per cent related to advance factories; 50 per cent related to infrastructure improvement projects; and 41 per cent related to national regional aids paid to industrial projects. Community aid towards retraining was made available not from the ERDF, but from the European social fund which was the responsibility of the Secretary of State for Employment.

Regional policy

Robert Woof (Blaydon) asked what aspects of present UK regional policy would need to be changed to comply with the powers and procedures of EEC policy.

Mr Cryer said the EEC commission was required to keep under review all systems of aid in member states. In co-operation with this country the commission had begun a review of the UK's regional aid system. It would be some time before the review could be completed and the commission made any demands known.

ERDF non-quota section

Kenneth Clarke (Rushcliffe) asked the Secretary of State for Industry when the council of ministers was next likely to discuss the proposal that there should be a section of the European regional development fund outside the national quota arrangement.

Mr Cryer said that some member states still had reservations about the operation of the proposed non-quota section. Further progress would need to be made in discussions at official level, which were to be resumed later last week, before the issue was ready for consideration by the council of ministers.

State aid to industry

Robert Woof (Blaydon) asked the Secretary of State for Industry if he would publish a table of the level of state aid to industry for each year since 1974, showing loans and grants separately for, respectively, investment grants, local employment acts, regional employment premium, export rebates, export credit guarantees, military aerospace research and development, civil aerospace and other research and development, shipbuilding, agriculture, fisheries and forestry.

Mr Cryer gave the information in the table below relating to those items of expenditure listed for which his department was responsible. He pointed out that further details of aid to industry could be found in part 2 of the white paper 'The Government's Expenditure Plans 1978-79 to 1981-82' (Cmnd 7049 – II).

Max Madden (Sowerby) asked for an estimate of the total of financial assistance likely to be paid by the Department of Industry to private industry for the forthcoming financial year.

Mr Cryer said that the 1978-79 provision for his department, included in programme four of 'The Government's Expenditure Plans', was £1,162 million net of receipts, at 1977 survey prices. Most of this expenditure was in support of private industry. Detailed forecasts for 1978-79 would appear in the supply estimates in the normal way.

Sperm whale oil

Albert Roberts (Normanton) asked why the continued import of sperm whale oil was regarded as essential to the leather industry.

Mr Cryer replied that the principal uses of sperm oil in the leather industry were to soften naturally harder leathers, and to give greater 'run' and 'handle' to higher grade leathers, such as gloving leathers. Though substitutes were in limited use in certain processes in the leather industry, satisfactory substitutes were not available for most of the oil's applications. The Department of Industry had, for some time now, encouraged a co-ordinated approach to research into substitutes. The British Leather Manufacturers' Research Association was currently running a research programme, funded by the department, aimed at learning more about the unique properties of sperm oil: this followed an earlier study which culminated in the publication of a report in July 1976 entitled 'The Utilisation of Sperm Oil in the Leather Industry'. Approximately half of all UK leather products were treated in some way with sperm oil. Until an effective substitute was found any major interruption in the supply of sperm oil to the leather industry could severely damage employment, and the industry's significant contribution to exports would be unavoidably diminished. The Department of Industry was encouraging research into substitutes so that

DEPARTMENT OF INDUSTRY EXPENDITURE — £ million (1977 survey prices) (net)

	1974-75			1975-76			1976-77			1977-78		
	Loans	Grants	Other	Loans	Grants	Other	Loans	Grants	Other	Loans	Grants	Other
Investment grants	—	169.0	—	—	79.8	—	—	25.5	—	—	7.0	—
Local employment acts	−17.5	26.6	—	−12.7	13.8	—	−10.1	3.6	—	−6.3	0.2	—
Civil aerospace												
Aircraft and aero-engines R&D	—	—	28.9	—	—	22.0	—	—	19.9	—	—	15.7
Concorde	—	—	119.3	—	—	94.8	—	—	48.9	—	—	41.2
RB 211	−1.9	—	77.0	−3.8	—	1.0	−2.3	—	12.1	−0.9	—	−1.4
Other air projects and assistance	6.0	—	23.3	27.7	—	65.6	−6.0	—	5.7	—	—	3.4
National space	—	—	3.3	—	—	3.1	—	—	3.0	—	—	3.3
International space	—	22.0	0.1	—	26.4	—	—	31.5	—	—	29.2	—
Total civil aerospace	4.1	22.0	251.9	23.9	26.4	186.5	−8.3	31.5	89.6	−0.9	29.2	62.2
Other research and development												
Industrial research establishments	—	—	22.4	—	—	20.9	—	—	18.5	—	—	18.8
Industrial R&D contracts	—	1.8	17.1	—	0.5	17.6	—	—	19.3	—	—	22.1
National Research Development Corporation	−1.7	—	0.2	—	—	—	−5.5	—	—	—	—	—
Technological and industrial sponsorship	—	—	5.5	—	—	8.4	—	—	6.8	—	—	10.4
Total other research and development	−1.7	1.8	45.2	—	0.5	46.9	−5.5	—	44.6	—	—	51.3
Shipbuilding												
Refinancing of home shipbuilding lending	127.0	—	—	104.7	—	—	71.0	—	—	−43.0	—	—
Shipbuilding interest support costs	—	—	52.2	—	—	39.0	—	—	50.5	—	—	26.4
Assistance to the shipbuilding industry	26.8	—	43.1	17.0	—	18.6	5.5	—	8.7	1.2	4.6	35.4
Total shipbuilding	153.8	—	95.3	121.7	—	57.6	76.5	—	59.2	−41.8	4.6	61.8
SUB-TOTAL OTHER DoI EXPENDITURE	138.7	219.4	392.4	132.9	120.5	291.0	52.6	60.6	193.4	−49.0	41.0	175.3
	33.5	320.6	93.3	26.2	377.3	423.9	148.3	395.2	149.7	191.4	387.5	170.0
TOTAL DoI EXPENDITURE	172.2	540.0	485.7	159.1	497.8	714.9	200.9	455.8	343.1	142.4	428.5	345.3

Note: All figures relate to programme 4 (trade, industry and employment) of the white paper Cmnd 7049.

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Robert Cryer
Leslie Huckfield

Department of Trade

Secretary of State: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

reliance on sperm oil could be ended, but, unfortunately, that position had not yet been reached.

EEC firms' projects in north

Robert Woof (Blaydon) asked how many inquiries had been received by the Department of Industry since 1 January 1975 from EEC companies contemplating new projects in the development areas in the northern region.

Mr Cryer replied that between 1 January 1975 and the beginning of February 1978 an estimated 110 EEC firms made specific inquiries of the Department of Industry about the possibility of setting up manufacturing projects in the northern region.

Shipbuilding redundancy payments

Michael Grylls (North West Surrey) asked the Secretary of State for Industry about the scope of the Shipbuilding (Redundancy Payments) Bill for the employees of Silley Cox and Company, Newark Ferguson, Menzies and Company, I. Kirkcaldy and Son, R. and H. Green and Silley Weir, R. Harris and Son (Plant Hire), R. Harris and Son (Brunton Builders), R. Harris and Son (Concrete), R. Harris and Son (Builders), Seemark Switches, Bluescroll, Moonchase, Oakspine, Hawthorn Leslie (Engineers) and Henry Edie and Company.

Mr Huckfield said he understood from British Shipbuilders that Silley Cox and Co employed 1245 people, Hawthorn Leslie (Engineers) employed 650, R. Harris and Son (Builders) employed 182, J. Kirkaldy and Son employed 41, and that the other companies referred to had no employees. All were within the definition of 'relevant company' in the Shipbuilding (Redundancy Payments) Bill. The eligibility of their employees to benefit under the terms of the bill would depend on the terms of the order.

Waste paper imports

Robert Taylor (Croydon North West) asked for the value and tonnage of wastepaper imports into the UK during each of the years 1976 and 1977; and for an estimate of the effects of such imports on the attempts to encourage the recycling of waste.

Mr Cryer answered that imports of waste paper were:

1976 – 100 161 tonnes, valued at £6.4 million
1977 – 123 874 tonnes, valued at £9.4 million

Exports were:

1976 – 54 930 tonnes, valued at £4.4 million
1977 – 44 508 tonnes, valued at £3.8 million

Net imports were about 2½ per cent (by volume) of the totals collected and recycled in the UK, and thus had at most a marginal effect on attempts to encourage recycling.

Micro-electronics support scheme

Michael Grylls (North West Surrey) asked what payments had been made under the micro-electronics industry support scheme at 31 January 1978.

Mr Cryer answered that payments made under the micro-electronic support scheme up to 31 January 1978 totalled £7,367,263.

Food prices

Arthur Lewis (Newham North West) asked if there would be an investigation to ascertain how and why in the week ended Friday 10 February there were 180 price increases, including breakfast cereals, cakes, canned meat, canned vegetables, ice cream, margarine and salad dressings, bringing the total since 1 January this year to 1962.

Mr Maclennan said that the Secretary of State for Prices and Consumer Protection did not believe that a Price Commission examination of this matter was called for. The figures quoted included prices rises for various varieties and sizes of the same products, and by themselves did not give an accurate picture of the trend in food prices. The January retail price index rose by 0.6 per cent over the December figure and the annual rate of increase was now down to 9.9 per cent. Complaints about prices charged by individual firms were a matter for the Price Commission.

Overseas tour operators

Gwilym Roberts (Cannock) asked if the 1978 profit margins of overseas tour operating companies would be referred to the Price Commission.

Mr Maclennan said that the bulk of overseas tour operators' costs were not susceptible to control in this country, and parliament exempted such operators from control on profit margins under the current price code; moreover there was at present no power to regulate charges for overseas package holidays following a Price Commission examination. He recognised that exchange rates were just one factor affecting the cost of a holiday, but it was right that the benefits of sterling appreciation should, wherever possible, be passed on to the consumer. He would be glad of any evidence that this was not being done, and he hoped that the forces of competition would ensure that all possible benefits were passed on to the consumer.

	Metal, unwrought or wrought (and articles thereof)		Ores and concentrates		Ferro-alloys		Oxides, hydroxides, salts, ashes and residues, etc	
	Country of consignment	Approximate percentage of quantity of total imports	Country of consignment	Approximate percentage of quantity of total imports	Country of consignment	Approximate percentage of quantity of total imports	Country of consignment	Approximate percentage of quantity of total imports
Tungsten	FRG	33	Portugal	20	a	—	Netherlands	36
	South Korea	16	Netherlands	14			FRG	28
	USA	12	FRG	11			USA	18
	Austria	7	USA	10			South Africa	10
Chromium	Japan	41	South Africa	63	South Africa	41	FRG	70
	USA	23	Philippines	26	Sweden	31	USSR	23
	Sweden	22	Finland	4	Norway	8	Canada	2
Nickel	Canada	81	None	—	Canada	33	Canada	57
	Australia	5			Greece	31	South Africa	34
	FRG	2			France	28	Netherlands	5
Cobalt	Belgium-Luxembourg	42	b	—	None	—	Canada	96
	Zambia	24					USA	2
	Finland	10					Belgium-Luxembourg	1
	USA	3					France	1
Titanium	USA	50	Australia	73	USSR	72	Italy	32
	France	6	Norway	23	Italy	9	FRG	28
	FRG	6	Taiwan	2	USA	6	Czechoslovakia	13
	Japan	5	Netherlands	1	Netherlands	5	Spain	11
Vanadium	FRG	54	b	—	Austria	67	FRG	44
	Belgium-Luxembourg	28			Norway	15	Finland	35
	USA	18			Sweden	8	India	13
					Switzerland	3	South Africa	8
Uranium	a	—	a	—	None	—	France c	67
							USA	19
							USSR	14
Zirconium	USA	64	Australia	89	None	—	b	—
	France	23	USA	10				
	Belgium-Luxembourg	12						
Molybdenum	Austria	69	Netherlands	34	Sweden	55	Netherlands	52
	USA	18	Chile	27	Austria	31	FRG	21
	FRG	5	Canada	25	Belgium-Luxembourg	13	Belgium-Luxembourg	20
	France	5	USA	8			China	6

Notes:
a details by individual country are not available for publication.
b imports of the metal in this form are not separately distinguished in the Overseas Trade Statistics.
c partial coverage only (compounds of uranium depleted in U-235 are not separately distinguished).

Anti-trust legislation

Ivor Clemitson (Luton East) asked what arrangements existed for international co-operation with member states of the European Economic Community and other countries in regard to the enforcement of anti-trust legislation against multinational companies.

Mr Fraser replied that the main arrangements were those established by recommendations adopted by the OECD council in 1967 and 1973. These provided respectively for co-operation between member countries on restrictive business practices affecting international trade and for a consultation and conciliatory procedure in relation to such practices by both national and multinational companies. Within the EEC, representatives of the competition authorities of member states met regularly within the framework of the commission's advisory committee on restrictive practices and monopolies, which was consulted about the operation of the EEC's competition rules.

Pan-Am at Prestwick

Margaret Bain (East Dunbartonshire) asked the Secretary of State for Trade about the future of Pan-Am Airways' operations at Prestwick Airport, Scotland, and in the UK in general.

Mr Clinton Davis said that under the UK/US air services agreement (Bermuda 2), the United States government had designated Pan Am to operate an all-cargo service to Prestwick as well as London and Manchester. The value of this service was commercially confidential. Northwest Orient had also been designated to operate a passenger and cargo service to Prestwick but had not yet applied to the Department of Trade for the necessary operating permit. The level of services operated was a matter for the commercial judgment of the airlines, and he could make no forecast of the consequences for employment at Prestwick.

Metal imports

Peter Hardy (Rother Valley) asked for a list of the main sources of imports of the following metals, with the approximate proportion of domestic requirement met by each source: tungsten, chromium, nickel, cobalt, titanium, vanadium, uranium, zirconium and molybdenum.

Mr Meacher pointed out that there were no commercially significant deposits of these metals or their ores in the UK and so, apart from re-cycling, imports represented the source of all domestic consumption. He gave the information in the table above for main sources of imports in 1977.

Tourism Act assistance

Mike Thomas (Newcastle upon Tyne East) asked how many applications for assistance under section 4 of the Tourism Act 1969 had been approved by the English Tourist Board although they had been respectively, rejected or deferred for further consideration by the relevant regional tourist board in each of the last three years.

Mr Meacher said that under the act, responsibility for deciding section 4 applications rested solely with the English Tourist Board (unless it wished to give assistance exceeding its delegated authority in which case he was consulted). It was rare for ETB decisions to be contary to the advice of the regional boards, but to give a precise figure would involve disproportionate effort and cost as it would be necessary to individually check over 1000 applications under section 4 made to ETB during the period 1975 to 1977 to ascertain what were the views of the regional boards in every case. In the case of the Northumbria Tourist Board which would have considered about a quarter of the successful applications in the last three years, ETB says that in one such case it did not follow the Northumbria board's advice.

Car exports to Japan

Richard Page (Workington) asked how many UK cars were exported to Japan in 1975, 1976 and 1977; and what was the estimated number for 1978.

Mr Meacher replied that UK exports of passenger motor cars to Japan were published under SITC(R) heading 732.1 in table VI of the Overseas Trade Statistics of the United Kingdom (the December issue for the years 1975 and 1977 and the annual edition for 1976). He could not make an estimate for 1978.

Staff canteen facilities

Patrick Cormack (South West Staffordshire) asked the Secretaries of State for Industry, Trade, and Prices and Consumer Protection about the cost to public funds of canteen and other catering facilities provided by their departments for employees.

Mr Huckfield replied that the premises, equipment and services for civil service staff restaurants were provided free of charge. The cost to public funds of this provision was not readily available. Each restaurant was currently entitled to a graduated subsidy designed to encourage efficiency and some units received reimbursement for special operating expenses.

For the Department of Industry the figures were:

	London	Elsewhere
	£	£
1976-77		
Subsidies	38 449	44 942
Sale of meals	196 207	148 483
1977-78 (6 months only)		
Subsidies	17 187	23 354
Sale of meals	82 812	68 040

Mr Meacher said the figures for the Department of Trade were:

	1976-77	1977-78 (6 months only)
	£	£
London		
Subsidies	18 354	8 693
Sale of meals	101 508	45 787
Elsewhere		
Subsidies	12 710	7 691
Sale of meals	65 757	36 364

Mr Maclennan said the Department of Prices and Consumer Protection had no staff restaurant facilities but the staff were able to use the canteens of other government departments in the area in which they worked.

Tuesday, 21 February

Shipbuilding redundancy payments

Michael Grylls (North West Surrey) asked about the scope of the Shipbuilding (Redundancy Payments) Bill for the employees of Warethorn properties, William Squires Merchants, Mirmakin, Mastlake, Yawbrook, Lintspress, Bartram and Son, Barclay Curle and Company and Hobbs and Smith.

Mr Huckfield said he understood from British Shipbuilders that Barclay Curle and Co employed 346 people and that the other companies referred to had no employees. All were within the definition of 'relevant company' in the Shipbuilding (Redundancy Payments) Bill. The eligibility of their employees to benefit under the Bill would depend on the terms of the order (see also page 469).

Small firms counselling service

Neville Trotter (Tynemouth) asked why in the small firms' counselling service advertisements in the Newcastle papers three of the six managerial businessmen shown as available to help those running businesses were shown as being available for consultation in Cockermouth, 80 miles from Newcastle.

Mr Cryer answered that the small firms counselling service was now operating throughout the northern region including Newcastle and Cockermouth and press publicity had been undertaken in the major regional newspapers. As coverage by Newcastle newspapers extended into Cumbria, it was decided to give publicity to the availability of counsellors in Cockermouth for the benefit of those firms whose owners might find it equally convenient to visit the area counselling offices in either Newcastle or Cockermouth

Aircraft and shipbuilding industries

Neville Trotter (Tynemouth) asked what was the book value at the date of nationalisation of the net assets of each of the 19 companies to whom a total of £21.96 million had been paid on account of compensation; and, in each case, how this compared with the sum paid on account of compensation and what percentage the payment on account bore to the net asset value.

Mr Kaufman replied that under the provisions of the Aircraft and Shipbuilding Industries Act the compensation for these companies was not related to their net assets at their respective vesting dates. The information requested was as follows.

Company	Net assets[1] at vesting day £ million	Payment on account £ million	Payment on account as percentage of net assets
British Aircraft Corporation (Holdings) Ltd	80.6	6.1	8
Hawker Siddeley Aviation Ltd Hawker Siddeley Dynamics Ltd	113.4	3.1	3
Scottish Aviation Ltd	1.0	0.5	50
Austin and Pickersgill Ltd	19.4	5.2	27
Brooke Marine Ltd	5.3	0.35	7
Cammell Laird Shipbuilders Ltd	14.9	0.15	1
Hall Russell and Co Ltd	9.5	0.3	3
Barclay Curle and Co Ltd Cleland Shipbuilding Co Ltd The Goole Shipbuilding and Repairing Co Ltd Smiths Dock Co Ltd Swan Hunter Shipbuilders Ltd Swan Hunter Training and Safety Co Ltd	28.8	2.35	8
Yarrow (Shipbuilders) Ltd Yarrow (Training) Ltd	19.5	1.4	7
George Clark and NEM Ltd	4.3	0.65	15
Hawthorn Leslie (Engineers) Ltd	−0.1	0.4	n.a.
John G. Kincaid and Co Ltd	7.2	1.45	20

[1] Net assets are taken as shareholders' funds plus long-term loans.

Beer prices

John Roper (Farnworth) asked whether in view of the fact that the safeguard regulations had obliged the Price Commission to allow Allied Breweries to increase the price of its beer by 2p a pint and that similar increases were being implemented by other major brewers, any of the brewers had indicated for how long they intended to hold these increased prices.

Mr Maclennan said he understood that, in the absence of exceptionally large unforeseen cost increases or changes in indirect taxation, Bass Charrington had offered to hold the prices of the beers for a year after the increases to be implemented later in February; similarly, Courage and Scottish and Newcastle had both offered to hold their recently increased prices until at least October. He welcomed the willingness of some brewers to reduce the frequency of their price increases, compared with the last few years, and he hoped that others would follow their example.

Aircraft noise

Neville Sandelson (Hillingdon, Hayes and Harlington) asked about the quota arrangements to be imposed under the government's policy of reducing night disturbance at Heathrow and Gatwick Airports.

Mr Clinton Davis said that, as announced on 7 November 1977, movements of the noisier aircraft – generally the first generation of subsonic jets – at Heathrow and Gatwick would be phased out over the next 10 years. The total number of permitted aircraft movements would be held constant over the next three years. The position after 1981 would be considered when the results of research into the relationship between aircraft noise and sleep disturbance were available. A jet aircraft would qualify for the quieter quota if the area in which it measured over 95 perceived noise decibels was less than 4 square miles on take-off and 2.5 square miles on landing. The quotas were as in the table below.

One-runway airports

Tim Renton (Mid-Sussex) asked for the maximum number of passengers a year currently handled by major international airports with only one runway in the United States, France, Germany, Japan, Belgium, Italy and any other relevant countries.

Mr Clinton Davis said that according to information recently published by the International Civil Aviation Organisation, the following international airports overseas with only one runway handled more than 1 million passengers in 1976. Passenger information regarding the Italian one-runway airports of Florence, Naples and Turin was not published:

Alicante	1 811 620
Belgrade	2 047 016
Budapest	1 054 940
Buenos Aires (Aeroparque)	2 967 773
Durban	1 094 881
Geneva	3 448 889
Hong Kong	4 415 636
Kuala Lumpur	1 523 861
Las Palmas	3 814 469
Lima	2 423 663
Lyon	1 758 072
Malaga	2 501 553
Moscow (Sheremetyevo)	3 948 913
Munich	4 607 322
Palma	6 328 165
Rio de Janeiro (Galeao)	3 414 940 (1975)
Seoul	2 305 923
Singapore	3 740 793
Stuttgart	2 414 059
Tenerife	2 805 776
Vienna	2 278 576

S. American woollen imports

Max Madden (Sowerby) asked what representations had been received about increasing exports of worsted and woollen cloth, and woollen yarn, from South America to the UK, especially Brazil, Uruguay and the Argentine.

Mr Meacher said the industry had expressed its concern about the level of imports of woollen and worsted fabrics from Argentina, and these imports were being closely monitored. The government was also considering with the industry whether there was a case for asking the commission to take countervailing or anti-dumping action against Argentina.

Mr Madden asked what representations had been made by the government to the governments of Brazil, Uruguay and the Argentine about their growing exports of worsted and woollen cloth to the UK, and their substantial duties against British exports of worsted and woollen cloth and woollen yarn.

Mr Meacher said these countries were all aware of the provisions of their agreements with the EEC and no such representations had been made. The questions of tariffs was being considered separately as part of the multilateral trade negotiations, and it was the UK's aim to secure reductions in these countries' tariffs on textiles.

NOISIER QUOTAS

Summer	Heathrow (including the number of noisier takeoffs in brackets)	Gatwick	Winter	Heathrow	Gatwick
1978	2 000 (135)	2 500	1978-79	1 800	1 250
1979	1 800 (120)	2 200	1979-80	1 600	1 100
1980	1 600 (105)	1 900	1980-81	1 400	950
1981	1 400 (90)	1 600	1981-82	1 200	800
1982	1 200 (75)	1 400	1982-83	1 000	700
1983	1 000 (60)	1 100	1983-84	800	550
1984	800 (45)	800	1984-85	600	400
1985	600 (30)	500	1985-86	400	250
1986	400 (15)	300	1986-87	200	100
1987	0 (0)	0	1987-88	0	0

QUIETER QUOTAS

These cover all non-jet aircraft, the quieter jets and, to the extent that this can be demonstrated in practice, other jets whose take-off at reduced weight matches that of the quieter jets at maximum weight.

Summer	Heathrow	Gatwick	Winter	Heathrow	Gatwick
1978	1 700	3 100	1978-79	1 400	1 700
1979	1 900	3 400	1979-80	1 600	1 850
1980	2 100	3 700	1980-81	1 800	2 000
1981	2 300	4 000			

Mr Madden asked for a list of import duties on worsted, woollen cloth and woollen yarn charged by South American countries, especially Brazil, Uruguay and the Argentine; and if these duties were the subject of negotiations prior to the multifibre arrangement.

Mr Meacher explained that the multifibre arrangement did not cover tariffs. These were being considered separately as part of the current round of the Gatt multilateral trade negotiations. The import duties charged on the goods in question were as in the table below.

	Tariff heading			
Country	Yarn of carded wool, not put up for retail sale (53.06)	Yarn of combed wool, not put up for retail sale (53.07)	Yarn of wool, hair or horse hair put up for retail sale (53.10)	Woven fabrics of wool or fine hair (53.11)
Argentina	40–45%	40–45%	50%	65%
Bolivia	10–15	10–15	10	20
Brazil [1]	85	85	155	205
Chile [2]	15	15	15	22
Columbia	55	55	55	75
Ecuador	40	40	50	90
Paraguay [3]	15	15	15	12
Peru [4]	52	52	52	92
Uruguay [5]	25	25	75	75
Venezuela	50	100	80–100	100

[1] The issue of import licences for these goods has been suspended until 31 December 1978. [2] Duty rates applicable at 1 February 1978. All import duties to be reduced to 10% by June 1979. [3] Some goods within these headings may not be imported. [4] None of these goods may be imported. [5] There is a surcharge of 90–110% applied to goods within these headings.

Mr Madden also asked what powers existed under the multifibre arrangement to reduce imports of worsted and woollen cloth, especially from Brazil, Uruguay and the Argentine.

Mr Meacher replied that imports of woven woollen fabrics from Hungary and the Republic of Korea were subject to quota. Imports from other countries which had bilateral agreements with the EEC could be brought under restraint if imports into the EEC or a member state in 1978 reached specified levels. In the case of Brazil the level in question was 5 per cent of 1977 imports into the EEC from third countries and in the case of Uruguay and Argentina the level was 4 per cent.

Wednesday, 22 February

Consumer advice centres

Edmund Marshall (Goole) asked how many applications had been received for capital cost grants for new consumer advice centres under the scheme announced on 29 November 1977; how many had been approved; and for a list of those centres offered grants.

Mr Fraser replied that the Department of Prices and Consumer Protection received 46 applications. With the funds available 28 had been approved, all but two of which were for new centres. The centres which had been offered grant-aid were as follows:

Scotland
Highland Regional Council – Fort William (m)
– Inverness (m)
– Wick (m)
Strathclyde Regional Council – Greenock
– Motherwell
Western Isles
Island Council – Stornaway

Wales
Clwyd County Council – Clwyd (m)
– Colwyn Bay
– Prestatyn
Mid-Glamorgan County Council – Caerphilly
West-Glamorgan County Council – Neath

Northern Region
Cleveland County Council – Redcar
*Tyne and Wear County Council – Southshields (m)
– Sunderland

West Midlands
Stoke-on-Trent District Council – Stoke-on-Trent
Walsall District Council – Walsall
Warwick/Leamington Spa – Leamington Spa
Consumer Group
West Midlands CAB area office Birmingham (Colmore Circus)
– Coventry
– West Midlands (m)
Wolverhampton District Council – Wolverhampton

East Anglia
Cambridgeshire County Council – Huntingdon (m)
– Fenland (m)

South East
Reading District Council – Reading
Rushmoor Consumer Group – Aldershot

London
Barnet Borough Council – Barnet (m)
Lewisham Borough Council – Lewisham

South West
*Wiltshire County Council – Swindon

(m) = Mobile.
* = Improvements to existing centres.

British Rail fares

Arthur Lewis (Newham North West) asked the Secretary of State for Prices and Consumer Protection what action he proposed to take in the light of the Price Commission's report on the question of rail passenger fares in London and the south-east.

Mr Maclennan replied that the secretary of state together with the Secretary of State for Transport, was considering this report, and discussions had taken place with the British Railways Board. The government's conclusions would be announced shortly.

EEC car exports to Japan

Richard Page (Workington) asked how many EEC cars were exported to Japan in 1975, 1976 and 1977; and what was the estimated number for 1978.

Mr Meacher said the numbers of recorded exports of cars from EEC countries to Japan in the past three years was as follows. Estimates for 1978 were not available:

NEW CARS

	1975	1976	1977	(latest available period)
UK	1865	600	1556	(Jan to Dec)
France	668	492	968	(Jan to Oct)
Italy	1899	464	n/s	
West Germany	18 233	22 398	16 123	(Jan to Nov)
Denmark	6	2	1	(Jan to Sept)
Total	22 671	23 956		

USED CARS

	1975	1976	1977	(latest available period
UK	113	291	616	(Jan to Dec)
France	n/s	n/s	1	(Jan to Oct)
Italy	n/s	37	140	(Jan to Aug)
West Germany	127	355	1074	(Jan to Nov)
Denmark	n/s	n/s	n/s	
Total	240	683		

Sources: Society of Motor Manufacturers and Traders National sources.
n/s: not specified.

Thursday, 23 February

Leasing caravan sites

Phillip Whitehead (Derby North) asked the Secretary of State for Prices and Consumer Protection, if he would make a statement on the outcome of his discussion with the managing director of Trellis Scott Ltd.

Mr Fraser replied that S. V. Dunstan, managing director of Trellis Scott, came to see him recently. Mr Fraser conveyed to him the concern and anxiety which had been expressed about certain aspects of the lease offered to licensees at the Dinas Country Club and Caravan Park in Dyfed and, in particular, the short notice given to licensees as to whether to accept the terms of the lease. Mr Dunstan assured him that:

1 caravan owners who did not intend to accept the offer of a lease, and who had evidence of having paid rent until 31 March 1978, and keep their caravans at the site until that date. In case of caravan owners who had already removed their carvans from the site, Trellis Scott would seek a refund from the previous owners of the site of any rent paid for the period 1 January to 31 March 1978;

2 a legally binding undertaking would be given in a letter to lessees that the up-grading of amenities on the site would be carried out, ie reconstruction of a heated swimming pool, site shop, club extension and tree planting scheme;

3 caravan owners at Dinas not wanting to buy a lease could sell their caravan up to 15 March, provided it was in reasonable condition, without paying commission to Trellis Scott, to anyone wishing to take up a lease with the company. Leases granted on the introduction of an existing licensee would be at the reduced premium offered directly to that licensee;

4 in the case of there being any legally enforceable agreements providing for 10 years' security of tenure by the previous owners of the Dinas site, Trellis Scott would honour such agreements and seek compensation from the previous owners;

5 caravan owners on any new site purchased by Mr Dunstan or his companies would be given the option either of buying a lease at a specified price, or a short lease for three years at a nominal fee plus the interest on the loan the company must secure to finance the plot for those three years. Maintenance charges and annual rent would also be payable in each of the three years. At the end of that time licensees would be given the option of buying the lease at the original offer price;

6 special consideration would be given to any case of real need or discernible hardship on the Dinas or Whiteford Bay sites.

Price Commission and productivity schemes

Mike Thomas (Newcastle upon Tyne East) asked the Secretary of State for Prices and Consumer Protection, about the role of the Price Commission in ensuring that productivity schemes were genuinely self-financing and did not result in higher costs or prices.

Mr Hattersley said that arrangements had been made for the Price Commission to receive information of any productivity scheme that came to the Department of Employment's notice. Decisions whether or not to investigate particular prices or margins, and what recommendations to make after an investigation, were for the Price Commission to take independently. But he had consulted the chairman of the Price Commission, who had informed him that the commission regarded productivity schemes, and the extent to which they were genuinely self-financing, as one of the factors which it took into account in appropriate cases in deciding both whether to investigate and in making recommendations following an investigation. It regarded this matter as falling within the criteria in section 2 of the Price Commission Act.

Price Commission report on footwear

John Garrett (Norwich South) asked the Secretary of State for Prices and Consumer Protection, when he expected to receive the report of the Price Commission on footwear.

Mr Maclennan said the commission was required to report by 31 March 1978, but it was open to the secretary of state to extend the deadline if he thought fit.

Food prices

Arthur Lewis (Newham North West) asked for an investigation to be made to ascertain how and why, despite a fall in inflation to 9.9 per cent, 270 food prices rose in price bringing the total food price rises since 1 January 1978 to 2232; and when he expected the fall in the inflationary spiral to 9.9 per cent reflected in a reducation in the retail prices which the consumer had to pay.

Mr Maclennan referred to his reply on 20 February (see page 469) and said the Secretary of State for Prices and Consumer Protection did not propose to direct the Price Commission to examine this question. When the retail price index for January was showing a rate of increase over the previous year of 9.9 per cent, it was only to be expected that there would be increases in the price of individual products. The number and size of such increases in future would depend on the government's success in reducing further the rate of inflation.

Nationalised industries

John Cartwright (Greenwich, Woolwich East) asked what further consideration had been given to the need to strengthen consumer representation in the nationalised industries.

Mr Maclennan replied that the government

would be putting forward proposals in the white paper on nationalised industries, which he hoped would be published shortly. Progress had already been made with, for instance, the setting-up of the new Electricity Consumers Council for England and Wales and the appointment of two consumer members to the new Post Office Board.

Tea prices

Gwilym Roberts (Cannock) asked about the Price Commission report on tea prices and profits and what steps he was taking to reduce prices and curb excessive profits.

Mr Maclennan said officials had discussed with representatives of tea blenders and of retailers the Price Commission's recommendation that prices should be reduced. The initial response of the tea blenders had been disappointing. The Secretary of State for Prices and Consumer Protection was however arranging a further meeting for 24 February. Retailers' representatives had said that any price cuts made by the blenders would be passed on in full.

Chloroform in toothpaste

Joyce Butler (Haringey, Wood Green) asked if it was intended to prohibit the use of chloroform in toothpaste by the implementation of EEC council directive on cosmetic products.

Mr Fraser said the possible health risk presented by the use of chloroform in tooth paste was under consideration by expert advisory committees of the Department of Health and Social Security and he intended to consider what action, if any, needed to be taken when their advice was received.

Overseas markets studies

Christopher Brocklebank-Fowler (North West Norfolk) asked the Secretary of State for Trade, if he would institute studies of overseas markets in order to determine those in which British goods and services had a competitive advantage.

Mr Meacher replied that in the early 1970s the department analysed information from overseas posts, domestic trade associations and companies, and identified a number of products and markets in which there appeared to be good prospects. This exercise had been updated, and together with the on-going discussions with NEDC and sector working parties, was a useful tool for determining the allocation of the government's export promotion efforts. In addition, the department was carrying out a specific study of how Britain's trade performance with non-oil developing countries could be improved.

Market entry guarantee scheme

Robert Taylor (Croydon North West) asked which export organisations were consulted before the introduction of the market entry guarantee scheme by the British Overseas Trade Board.

Mr Meacher said consultation was not confined to export organisations. It included the Confederation of British Industry, the British Export Houses Association, the chambers of commerce and industry in Birmingham, Cardiff, Glasgow, Leicester, London, Manchester, Northern Ireland, Sheffield, Slough and Tyne and Wear, representative trade bodies for the book, business equipment, carpet, clothing, electrical, electronic engineering, food, footwear, furniture, health-care, jewellery and giftware, motor vehicle, scientific instruments and ship and boat-building industries. Comments were invited from Industrial Strategy sector working parties. Unsolicited comments were received from a number of other bodies and individual firms. Finally the scheme was laid before the British Overseas Trade Advisory Council, a body with wide and representative membership especially created to advise on such topics.

S. American woollen imports

Max Madden (Sowerby) asked for figures, by value and volume, of exports of worsted and woollen cloth and wool yarn from Brazil, Uruguay and the Argentine to the UK in each of the last five years.

Mr Meacher said there were no imports of worsted and woollen fabric from these countries during 1973 and 1974, or of wool yarn from 1973 to 1976 and gave the information (right) for later years:

COMPLETIONS OF MERCHANT SHIPS OF 100 GRT AND OVER — 000's gross registered tons

	1973	1974	1975	1976	1977 provisional
United Kingdom	1 067	1 198	1 170	1 500	1 019
Belgium	230	256	201	211	132
Denmark	1 004	1 076	969	1 034	708
France	1 170	1 046	1 150	1 673	841
Federal Republic of Germany	1 926	2 142	2 499	1 874	1 516
Italy	837	953	792	715	774
Netherlands	852	942	1 028	634	236
Japan	14 751	16 894	16 991	15 868	11 701
Finland	186	192	267	249	360
Norway	984	964	1 052	758	566
Sweden	2 290	2 181	2 188	2 515	2 311

Figures are not separately available for Luxembourg and the Republic of Ireland.
Source: Lloyd's Register of Shipping.

Merchant ship production

Michael Grylls (North West Surrey) asked for figures for production of merchant ships in thousands gross registered tons for each EEC country, Japan and the Scandinavian countries for the years 1973 to 1977, inclusive.

Mr Huckfield gave the information in the table above.

Ferrous and non-ferrous foundry schemes

Bruce George (Walsall South) asked how many companies in England and Wales, the west Midlands and the Walsall area had applied for, and how many had received, aid under the industry act scheme for the ferrous and non-ferrous foundry industries; what was the total value of the aid; and how much remained to be allocated.

Mr Cryer answered that the following applications and offers of assistance had been made under the schemes for the ferrous and non-ferrous foundry industries in the areas specified:

£ million

	Applications	Offers to date	Value of offers
Ferrous foundry scheme			
England and Wales	470	345	64.7
of which West Midlands	142	99	17.3
of which Walsall	17	13	2.5
Non-ferrous foundry scheme			
England and Wales	88	28	3.7
of which West Midlands	30	11	1.8
of which Walsall	4	2	0.3

Taking account of Scotland and Northern Ireland, the total value of offers to date was £72.5 million and £4.8 million under the ferrous foundry and non-ferrous foundry schemes respectively, as compared with allocations of £80 million and £20 million respectively. With total investment being assisted of some £331 million, the ferrous foundry scheme had been a resounding success and should contribute significantly to a major improvement in the industry's overall position. The non-ferrous scheme had still five months to run but it was already making an impact, and he was confident that it would prove of substantial benefit.

Shipbuilding redundancy payments

Michael Grylls (North West Surrey) asked a number of questions about the eligibility of employees for special redundancy payments to a maximum of £10,400 under the Shipbuilding (Redundancy Payments) Bill.

Mr Huckfield pointed out that the number of any redundancies declared since 1 July 1977 by any of its subsidiary companies was a matter for British Shipbuilders. It would be for British Shipbuilders to make all arrangements for payments under the Shipbuilding (Redundancy Payments) Bill. The figure of £10,400 referred to was the maximum permissible payment to any individual taking together payments under the scheme presently being considered and the Redundancy Payments Act 1965.

Friday, 24 February

Telecommunication schemes

Michael Latham (Melton) asked for a list by name and date of approval of the statutory schemes which had been made regarding the telephone service under the Post Office Act 1969 and which were currently still in force.

Mr Kaufman said telecommunication schemes were made by the Post Office. They did not require the approval of the Secretary of State for Industry but were published in the London, Edinburgh and Belfast *Gazettes*. The schemes currently in force and the dates on which they came into operation were as follows:

T1/1976 Post Office telecommunication scheme 1976 1 June 1976
T1A/1977 Post Office telecommunication amendment (no. 2a) scheme 1977 24 May 1977
T1A/1977 Post Office telecommunication amendment (no. 2a) scheme 1977 24 May 1977
T1/1978 Post Office telecommunication amendment (no. 3) scheme 1978 21 January 1978

Mr Kaufman said the following schemes had been made since the Post Office Act 1969 came into force, but were no longer in operation:

T1/1970 Post Office telephone amendment (no. 1) scheme 1970* 13 April 1970
T2/1970 Post Office telephone amendment (no. 2) scheme 1970* 1 July 1970
T4/1970 Post Office telephone (Channel Islands) amendment (no. 1) scheme 1970* 1 July 1970
T1/1971 Post Office telephone scheme 1971 15 February 1971
T7/1971 Post Office telephone (Channel Islands) scheme 1971 15 February 1971
T8/1971 Post Office telephone amendment (no.1) scheme 1971 1 October 1971
T9/1971 Post Office telephone (Channel Islands) amendment (no.1) scheme 1971 10 January 1972
T1/1972 Post Office telephone amendment (no. 2) scheme 1972 8 May 1972
T2/1972 Post Office telephone amendment (no. 3) scheme 1972 19 June 1972
T3/1972 Post Office telephone scheme 1972 1 January 1973
T1A/1973 Post Office telephone amendment (no. 1a) scheme 1973 1 April 1973
T7/1973 Post Office telephone amendment (no. 3) scheme 1973 15 October 1973
T1/1974 Post Office telephone amendment (no. 4) scheme 1974 12 August 1974
T4/1974 Post Office telephone amendment (no. 5) scheme 1974 1 September 1974
T5/1974 Post Office telephone amendment (no. 6) scheme 1974 3 September 1974
T7/1974 Post Office telephone scheme 1974 2 January 1975
T1/1975 Post Office telephone amendment (no.1) scheme 1975 28 April 1975
T4/1975 Post Office telephone amendment (no. 2) scheme 1975 1 October 1975

* These are amendments to the scheme made in 1968.

	worsted and woollen fabric						wool yarn	
	1975		1976		1977		1977	
	Tonnes	Value	Tonnes	Value	Tonnes	Value	Tonnes	Value
Uruguay	14	101	18	179	15	135	0	0
Argentine	0	0	8	47	203	1 132	53	157

Note:
1 all values are £ thousand cif.
2 a quantity of less than 1 tonne of wool yarn was imported from Brazil in 1977 at a value of £1 000 cif.

European community news

Inflation hits 'invisible' trade with EEC

A decline in net invisible earnings on transactions with the EEC from a surplus of £374 million to a deficit of £164 million was mainly caused by increase in the deficit on general government services, a decline in the surplus on interest, profits and dividends and an increase in the deficit on general government transfers said Robert Sheldon, Financial Secretary to the Treasury on 20 February.

Answering a parliamentary question Mr Sheldon said that offsetting these to some extent was an increase in net earnings on financial services, travel and civil aviation.

Mr Sheldon explained that the increase in the deficit on general government services was largely the effect of inflation on defence expenditure in Germany.

The decline in the surplus on interest, profits and dividends he attributed to the result of several changes; public sector borrowing from the European institutions had increased over the period, and hence the interest payments to these bodies had increased; private sterling balances held by EEC residents also increased over the period and lead to increased interest payments to the EEC.

Mr Sheldon said that the deficit on general government transfers was the result of increased net contributions to the EEC institutions.

Ministers discuss economic situation

During an informal discussion of the economic situation on 20 February, the EEC finance ministers asked the commission to prepare a paper for further discussion at the 20 March council. This will in turn prepare for discussions at the European council on 6 to 7 April.

In a written reply to a parliamentary question on 23 February Joel Barnett, Chief Secretary to the Treasury, also said that the council discussed a draft decision empowering the commission to make loans to promote investment within the EEC. It requested the competent bodies to examine further the technical aspects of the proposal and to report back when the European assembly had given its opinion.

Ministers took note of a statement by the commissioner for economic and financial affairs on a commission communication on the economic and monetary action programme for 1978.

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EEC rules of competition

The *Official Journal of the European Communities* L46, 17 February 1978, contains the text of a commission decision dated 23 December 1977 relating to a proceeding under article 85 of the treaty of Rome.

78/155/EEC BMW Belgium NV/Forty-seven Belgian dealers (reference DGIV 29.146). The decision relates to applications received by the commission on 9 December 1975 from Automobilimporte C. Heuer and MGH Motorgesellschaft mbH for an initiation of proceedings finding that the general export prohibition contained in distribution agreements BMW Belgium had entered into with certain of its Belgian dealers infringed article 85 of the treaty.

In January 1975 BMW Belgium had notified the standard distribution agreement entered into by its dealers and applied for exemption under article 85(3) of the treaty; this agreement contained no export prohibition.

The commission found that there had been an infringement of article 85(1) between 29 September 1975 and 20 February 1976 when the export prohibition had operated. The commission considered the infringement to be serious because a selective distribution system which itself restricts competition had been compounded by a general export prohibition based on a prohibited agreement. BMW Belgium has been fined 150 000 units of account and a fine of between 2000 and 1000 units of account has been imposed on 47 distributors for participating in the agreement.

Further information can be obtained from the Department of Prices and Consumer Protection, Fair Trading Division, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5092.

More anti-dumping duties on iron and steel products

More provisional anti-dumping duties have been imposed by the EEC commission on imports into the EEC of various iron and steel products.

The rates of duty are variable and are designed to bridge the difference between the delivered price of each imported consignment and the commission's basic price (see *Trade and Industry*, 13 January).

The following products became subject to the new duties from midnight 20 February:

73.08 A and B: Iron or steel coils for re-rolling, originating in Australia.

The following products became subject to the new duties from midnight 21 February:

73.13 BIVc: Sheets and plates of iron or steel, hot-rolled or cold-rolled, other than electrical sheets and plates, zinc-plated (other than electrolytically zinc-coated) (ECSC) originating in Japan or the GDR and Berlin (East).

Commission finances new UK research and studies

The commission has just approved the following four research contract and two study contracts to which it is contributing £120,130.

United Kingdom Atomic Energy Authority, London. Recycling of plutonium in heavy water reactors. 1. Study of self-radiolysis of plutonium nitrate solutions. *Commission contribution:* £17,500. 2. Specifications for tests representing the effects of aircraft accidents with a view to improving the design of containers for the carriage by air of plutonium oxide, plutonium nitrate and fresh LWR mixed oxide fuels. *Commission contribution* (100 per cent): £46,000.

United Kingdom Atomic Energy Authority, Harwell. Research over two years to design and test a format for data on waste disposal in the ECDIN data bank and to collate data in this field for a number of chemicals. *Commission contribution:* £12,500.

Associated Nuclear Services Ltd, Epsom, Surrey. Quality assurance of operating nuclear power plants: The study is a continuation of the work already carried out by Associated Nuclear Services. The proposed work consists of a comparison of quality assurance practices in Germany, France, the UK and United States. *Commission contribution* (100 per cent): £12,500.

The Central Water Planning Unit, Reading, Berks. Evaluation of groundwater resources in the UK – a study for a cartographic representation of hydrogeological and geological data of underground water in the UK. *Commission contribution:* (100 per cent): £15,000.

Water Research Centre, Henley-on-Thames. Research to develop water quality objectives for freshwater fisheries – cadmium in the presence of other heavy metals. *Commission contribution:* £16,630.

Titanium dioxide: EEC action on waste disposal ...

Discussions in Brussels lasting over two years culminated in the adoption on 20 February by the EEC council of ministers of a directive controlling waste disposal from the titanium dioxide industry. Those discussions started with the publication, in July 1975, of proposals from the EEC commission which would have required a 95 per cent reduction in the amount of waste from this industry disposed of into the sea. Colin Grimsey of the Directorate of Water at the Department of the Environment describes the final outcome of the discussions and how the directive affects the UK.

The UK has, of course, always accepted that disposal of waste from the titanium dioxide industry should be monitored and controlled. But the commission's original idea of imposing a uniform programme of reduction throughout the community was incompatible with UK practice because it took no account of local circumstances.

In the UK the waste, consisting mainly of iron compounds and acids, is disposed of by discharging through pipelines in the Humber and Tees estuaries, on whose banks the plants of the UK manufacturers are situated. Studies of waste disposal from titanium dioxide plants throughout the world have indicated that waste from this industry can be disposed of to the sea – to take advantage of its natural capacity for neutralising acids – without harming the environment.

As the only feasible way of reducing the amount of waste discharged by UK manufacturers would have been neutralisation using lime, and dumping of the resulting 1 million tonnes of solid wastes on land, the overall effect of the commission's original proposals would have been to increase pollution.

Subsequent negotiations led to a compromise which was agreed in principle by the council of ministers last December, and has now been put into effect as a directive. Under it, member states are required to ensure that waste is disposed of without harm to the environment, and to authorise and monitor all waste disposal operations, whether to the sea, on land or underground. Authorisations can only be granted if a scientific assessment indicates that there will be no harmful effects on the environment.

Monitoring is required both of the waste disposal itself – to ensure that individual authorisations are complied with – and of the effects of waste disposal on the local environment. If these studies indicate that an authorisation is not being complied with, or that there are harmful effects on the environment, any necessary remedial measures will have to be taken. Once part II of the Control of Pollution Act 1974 has been implemented in full, all discharges of waste will require consents from the relevant water authority; and, since it is normal UK practice to monitor the waste itself and the environment affected, this aspect of the directive should present no problems in this country.

The directive also requires member states to draw up 10-year programmes for the progressive reduction, and eventual elimination, of pollution caused by existing plants. These programmes have to be sent to the commission by July 1980. As a result of UK pressure, this requirement has been supplemented by a provision under which a country will not have to prepare or introduce a programme for a particular factory, if, by August this year, they can produce scientific evidence to convince the commission that the waste discharged from that plant does not cause pollution. Officials from the Department of the Environment and the Ministry of Agriculture, Fisheries and Food, which is responsible for some aspects of marine pollution, are already discussing with the industry and the water authorities concerned, the implications of these provisions for the UK.

So far as new plants (and substantial extensions to existing ones), are concerned, the directive only permits a member state to authorise them if they use the least polluting materials, techniques and processes available. The government is not aware of any plans for expansion by the UK industry which would be covered by these provisions; but, like other aspects of this directive, these requirements are consistent with UK policy and practice on the control of pollution.

... and on toxic waste

Toxic and dangerous wastes – materials that are contaminated with substances that constitute a danger to health or the environment – are covered by a recent EEC directive. Anthony Fagin of the Department of the Environment outlines its major provisions and how they will be applied in the UK.

The EEC ministers agreed a directive on toxic and dangerous waste on 12 December 1977, following a 'framework' directive on waste published in July 1975. The new directive applies to waste containing or contaminated by a range of substances or materials of such a form or in such quantities or concentrations as to constitute a danger to health or the environment.

The directive does not prescribe the form, quantities or concentrations which would bring the substances within its scope but this is left to the discretion of member states in implementing its provisions in their national legislation.

The directive covers some of the same ground as the framework directive, eg requiring the establishment of competent authorities to control the disposal of toxic and dangerous waste; and in requiring encouragement to be given to the prevention of waste, to its processing and recycling and to the reclamation of raw materials.

The major provisions of the directive are:

- ☐ the establishing of a licensing regime under which competent authorities would issue permits for the storage, treatment and/or disposal of waste covered by the directive,

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- a requirement that the competent authorities draw up and keep up to date plans for the disposal of waste covered by the directive,
- a requirement that all those involved in handling a consignment of waste at each stage of the disposal process from waste production to final disposal shall maintain a register on which essential details are recorded, and
- a requirement that when waste is transported, each consignment shall be accompanied by a consignment note providing details which would permit a complete history of each consignment to be obtained.

The directive will be implemented through part I of the Control of Pollution Act 1974 under which the provisions of the framework directive have already been given effect so no primary legislation will be required.

Waste disposal

The first provision is already covered by sections 3 to 8 of the 1974 act under which the waste disposal site licensing system came into full effect on 14 June 1977. The second provision is covered by section 2 which requires a waste disposal authority to prepare and up-date a plan on the basis of a survey. This provision is due to come into operation on 1 July 1978. (Separate plans will not be required for toxic and dangerous wastes, as these fall within the general definition of controlled waste covered by the whole of part I of the act.) The third and fourth provisions will be covered by regulations which it is proposed to introduce during the course of the year under section 17 of the act dealing with 'special' waste.

The regulations envisaged under section 17 would provide for a consignment notice system to ensure that special wastes can be followed through from their point of origin to final disposal. A document describing the form, quantity and concentration of the waste would be raised by the waste producer and signed by the contractor transporting and disposing of it. Copies would be sent at the time the form was raised and also on completion to the waste disposal authority in whose area the waste arose. Those handling the waste would also be required to maintain a register.

The procedures envisaged under section 17 are expected to be less rather than more onerous than those required at present under the Deposit of Poisonous Waste Act 1972.

However, the repeal of that act, on the introduction of regulations under section 17, should not be regarded as a relaxation of control. The site licensing regime already in operation provides a great measure of control which did not exist when the Deposit of Waste Act was enacted. That control will be strengthened in respect of special wastes.

Under the Department of the Environment's auspices a joint industry/waste disposal authority group is at present considering the design and use of a consignment note and register. It is hoped to distribute a consultation document on the proposed regulations to interested parties soon.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

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Still small enough to care

Overseas trade news

British firms may win Polish orders worth £150m – Dell told

British firms may win orders worth around £150 million to supply plant and equipment to the Polish steel industry, Edmund Dell, Secretary of State for Trade, was told at the conclusion of his three day visit to Poland, 20 to 22 February.

Negotiations are now in progress covering the supply of a large scale cold rolling mill, and a number of other smaller projects in the metallurgical sector. The outcome will depend on the competitiveness of British offers. The Polish government indicated that these five projects might well be implemented in the fairly near future.

Mr Dell also handed to the Poles a list of 10 other projects in which British exporters are interested, seeking an indication of their priority and timing in Polish development plans. He was informed by Mr Sidorowicz, Deputy Minister of the Chemical Industry, that one of the largest of these projects – a new polyester fibre complex at Pila – is to be developed in the near future. The UK share in this, if successfully negotiated, could amount to £125 million.

Mr Dell said he believed his visit had demonstrated the importance the UK attaches to relations with Poland – Britain's second largest east European trading partner. The Polish Minister of Foreign Trade, Jerzy Olszewski, had made it very clear how much value the Poles placed on trade and co-operation with the UK and their desire generally to maintain the level of their economic relations with western countries.

Mr Dell said he recognised that Poland had certain economic problems but he had found considerable evidence that these problems were being overcome. Polish ministers had made clear their firm determination to maintain Poland's high reputation as a reliable trading partner. A number of projects would go ahead on a collaborative basis, and Mr Dell was very satisfied that his visit had helped take forward the development of bilateral trade relations.

Dell holds talks with Australian minister

Victor Garland, left, Australian Minister for Special Trade Representations with Edmund Dell, Secretary of State for Trade. They met on 23 February for discussions.

Minister of state to visit British display at Paris agricultural shows

Edward Bishop, Minister of State at the Ministry of Agriculture, Fisheries and Food, will tour the British stands at the international agricultural exhibition, and the international agricultural machinery exhibition, running concurrently at the same exhibition complex in Paris from 5 to 12 March. His visit on 9 March has been arranged to coincide with British Day at the shows.

A total of 39 companies are taking part in the exhibitions with the backing of the British Overseas Trade Board and the sponsorship of the British Agricultural Export Council and the Agricultural Engineers Association.

In the livestock section, British breeders will show Devon and Friesian cattle, one Hereford bull and Dorset Downs sheep. The National Sheep Association, the National Cattle Breeders Association and the British Semen Export Council will each have an information stand. There will also be an English pub – a traditional feature of the British participation at these annual events.

On show in the agricultural machinery section will be several new British products including irrigation equipment and a trailer stacker unit. Other British machinery on display will include forklift loaders, generators, troughs, tractors, moisture testing instruments, slurry tanks, mechanical feeding systems, veterinary equipment, prefabricated pig housing and agricultural publications.

In 1977 total exports of agricultural machinery to France amounted to £28.2 million. The figure for livestock was £25.6 million and for animal foodstuff £8.4 million. Worldwide exports for the same year were respectively £584 million, £109.5 million and £60.5 million.

Energy secretary in US

Tony Benn, Secretary of State for Energy, went to the United States from 21 to 24 February, where he met Dr James Schlesinger, United States Secretary of State for Energy, at the White House.

During his visit, Mr Benn attended an international conference on energy conservation, sponsored by the District of Columbia Bar amongst others, which he addressed.

Mr Benn's schedule also included calls on major oil corporations and meetings with senators and others in public life, as well as a discussion at Georgetown University Centre for Strategic and International Studies.

Proposed British pavilion at Baghdad fair

If there is sufficient response from industry the British Overseas Trade Board will organise a British pavilion at the Baghdad international fair, 1 to 15 October. The fair itself is a general trade event and covers a wide range of capital and consumer goods and services.

However fields where future expansion in Iraq appear to be greatest are agricultural machinery, irrigation equipment, contracting plant, construction machinery, communication equipment, electrical generation and transmission, sewerage, water supply and treatment.

Increased oil revenue has enabled Iraq to plan for a soundly based agro-industrial economy. Large agricultural schemes and industrial undertakings are scheduled to be completed during the current development plan (1976-80). Emphasis during the 1978 investment programme is being placed on the development of infrastructure, agricultural and social services. Nevertheless, the largest cash allocation will be to industry.

British exports to Iraq are increasing steadily. In 1975 they were £137.1 million, in 1976 they totalled £149.9 million, and the figure for 1977 was £166.9 million. This trend has been reflected in the growing interest of British firms in exhibiting at the annual Baghdad international fair.

The closing date for applications is 23 March 1978.

Further information including details of the support offered by the BOTB and application form for space are available from Paul Robinson, Room 115, Hillgate House, 26 Old Bailey, London EC4H 7HU, tel. 01-248 5757, ext. 7314.

Information office available at Hanover fair

At this year's Hanover Trade Fair, 19 to 27 April, there will be an official British trade information office in the *Internationaler Treffpunkt in Congress-Centrum*, Room 34/35 which is situated in the Mittelallee.

It will be manned by members of the com-

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SWINDON

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mercial section of the British consulate-general in Hanover with the assistance of members of other British consulates-general in the Federal Republic and the British embassy in Bonn.

The function of this office is to receive trade inquiries from buyers and agents, maintain close links with the Department of Trade and to assist British exhibitors with their commercial activities. The office telephone number is Hanover 89-3211/12 with effect from 19 April. The telex number is 9230323 and the answer back is brfr d.

Firms with success stories which they would like publicised should pass them to the British trade information office (Elke Brockmann) for onward transmission by telex to the Department of Trade. The text should be fully drafted so that no editing will be necessary before transmission. There will also be details concerning foreign trade delegations available in the information office.

Seatag hosts dinner for new Thai ambassador

Denis Rooney, chairman of the British Overseas Trade Board's south east Asia trade advisory group (Seatag) and his wife were the hosts at a dinner on 15 February for the new Thailand ambassador Phan Wannamethee.

Also present were Jim Wilks, BOTB's chief executive and various members of Seatag and representatives of the Foreign and Commonwealth Office, Department of Trade as well as the Thai commercial attaché, Somsak Yamasmit and his wife.

During the after dinner speech Mr Rooney pointed out that, although Britain and Thailand were not traditional trading partners, trade had expanded during 1977 by 40 per cent in value terms by both partners. There was also a greater awareness between the EEC and Asean (the Association of South East Asian Nations) of which Britain and Thailand were members respectively. It was encouraging to see Thailand take advantage of the EEC's inward mission scheme for developing countries which was sponsored in the UK by the Import Opportunities Office located at the London Chamber of Commerce.

UK international conference on manufacturing to be held

There will be an international conference on manufacturing management and technology in the UK, organised by the Institution of Production Engineers at Olympia, London, on 2 to 6 October 1978.

The event is being held in conjunction with Pep '78, the international production engineering and productivity exhibition, which is being sponsored by the institution and the Gauge and Tool Makers' Association.

The institution's conference committee has invited speakers to present papers on a carefully chosen programme of topics. The institution's membership represents the country's leading experts in the management and technology of manufacture.

For further information contact The Conference Secretary, The Institution of Production Engineers, Rochester House, 66 Little Ealing Lane, London W5 4XX, tel. 01-579 9411.

British pavilion at Transpo-Asia in Singapore

There will be a British pavilion organised by the British Overseas Trade Board at the first international transportation, maintenance and ancillary products show 'Transpo-Asia' in Singapore from 25 to 29 November 1978, provided there is sufficient response from industry.

The fair's coverage is wide. It will cover all road, rail, sea and air transport equipment and systems, ancillary products and communication equipment. This will include port installations, mechanical handling equipment, refrigeration and air-conditioning equipment, passenger and cargo vessels, rolling-stock, fire-fighting equipment, aircraft, spare parts, workshop equipment, tunnel construction machinery, simulators and training equipment, engineering consultancy, banking and insurance services.

Singapore is a highly sophisticated market, second only in Asia to Japan in terms of GNP per capita. It is an accustomed market for British businessmen and is often the base for many south east Asia regional representatives. Singapore's main strength is its success in entrepot trade as well as manufacturing industries and banking. In this rapidly changing situation, and with fierce competition from Japan, the United States and the EEC, the lowest price does not always win the order, delivery is often more important than price.

Although in value terms British exports to Singapore have increased from £10 million in 1975 to £201 million in 1977, the UK share of the total market has decreased. The product coverage of the exhibition gives British exporters the opportunity to recover some of this lost ground.

'Transpo-Asia' will also be a venue to promote goods of a somewhat less sophisticated kind than those aimed at the Singapore market, and in which visiting representatives from surrounding countries may be interested.

Closing date for applications is 14 April 1978. Further details including costs and an application form for space are available from Paul Greig, Room 008, Hillgate House, 26 Old Bailey, London EC4H 7HU, tel. 01-248 5757, ext. 7099.

Chamber organises pre-shipment finance

London Chamber of Commerce and Industry is organising a seminar on pre-shipment finance on 22 March designed to help small and medium-sized companies. According to the chamber, problems connected with pre-shipment finance are one of the greatest worries of all for smaller companies going into the export field.

The seminar is to be chaired by John Boisseau of Tennant Guaranty Ltd, chairman of the British Export Houses Association's export finance houses committee, and the speakers will include R. Froome, group adviser to Barclay's Bank International; M. A. Maberly, marketing director of Credit Factoring Ltd, and T. K. Bridgnan, a director of the Credit Insurance Association.

At the Seatag dinner, left to right, Mrs Somsak Yamasmit, Mr McCulloch, the Thai ambassador, Phan Wannamethee, Mr Rooney, Mr Wilks.

Frozen food export seminar to be held

Frozen food is the subject of an export seminar, organised by the British Frozen Food Federation in co-operation with the British Food Export Council, on 30 March.

The seminar will be held in the river suite of The World Trade Centre, East Smithfield, London E1, starting at 10 am and finishing about 5 pm.

Speakers will be Mrs E. Scriven, assistant director of the British Overseas Trade Board; Alan Battle, director of the British Food Export Council; J. H. McLean, a senior executive of the Intervention Board for Agricultural Produce; W. C. Maycock, head of the headquarter branch of Customs and Excise; W. K. Craig, managing director of John Sutcliffe and

Son (Grimsby) Ltd, and K. I. Humphrey, a senior underwriter of the Export Credit Guarantee Department.

Applications for tickets should be sent to The Secretary, British Frozen Food Federation, Honeypot Lane, Colsterworth, Grantham, Lincolnshire. Tel 0476-84 414.

Uranium extraction course organised

Extractive metallurgy of uranium is a short course sponsored jointly by the Department of Metallurgy and Materials Science, University of Toronto and the metallurgical society of the Canadian Institute of Mining and Metallurgy, Hydrometallurgy section being held from 29 May to 2 June.

The course is designed to review the principles of uranium extractive metallurgy and to produce a description of current operating practice and developments in the field. The lectures will be supplemented by daily problem sessions and by an all-day workshop on plant design on the final day of the course.

Further information may be obtained from Dr R. T. McAndrew, Department of Metallurgy and Materials Science, University of Toronto, Toronto, Ontario, Canada, M5S 1A4.

Business opportunities seminar on the US coastal south

Business opportunities in the United States' coastal south, are the subject of a seminar to be held in London at the Churchill Hotel on 3 May, and repeated in Birmingham at the Albany Hotel on 4 May 1978. This area comprises the states of Virginia, North Carolina, South Carolina, Georgia and Florida.

The seminar will be of particular interest to senior management of companies interested in doing business in the southern region of the United States. In addition, because of the region's existing business orientation, the seminar will have particular relevance to manufacturing, transportation, agriculture, forestry, wholesaling, tourism, retailing, finance and most international trading companies.

Case studies

The seminar is being organised by the Coastal Plains Regional Commission, a federal-state partnership which combines the economic aspects of the five states to give foreign companies an entry to North America. Presentations will be given by both leading American and British speakers and include case-history studies on UK companies who have established successful business and trading arrangements in the area.

Businessmen interested in attending either the London or Birmingham seminars should contact The Seminar Co-ordinator, Coastal Plains Regional Commission, 26 Fitzroy Square, London W1P 6BT, telex. 298974, tel. 01-388 7421.

Course on accounting for overseas currencies

Two one-day non-residential courses on 'Accounting Treatment for Overseas Currencies' are being mounted by the English Institute at Chartered Accountants' Hall on 6 April and 18 May.

These courses will provide participants with a clear understanding of the proposals contained in the Exposure Draft ED21 'Accounting for Foreign Currency Transactions' and will cover the effects of these proposals on financial statements.

Topics to be covered include the treatment of overseas subsidiaries, the treatment of monetary assets and liabilities, inflation accounting aspects, and the presentation of exchange differences in accounts.

Further information from the Courses Department, The Institute of Chartered Accountants in England and Wales, PO Box 433, Chartered Accountants' Hall, Moorgate Place, London, EC2P 2BJ.

Improvement in tanker safety and pollution

Improvement in the safety of life at sea and the protection of the marine environment should result from an international agreement signed last week Stanley Clinton Davis, Parliamentary Under-Secretary of State for Companies, Aviation and Shipping said on 23 February in reply to a parliamentary question.

The agreement was signed at the end of the International Maritime Consultative Organisation tanker safety and pollution prevention conference.

Mr Clinton Davis said: 'The protocols adopted by the conference contain provisions which should lead to a marked improvement in the safety of life at sea and the protection of the marine environment. The provisions, which commanded a wide measure of international support, are capable of being implemented within a relatively short time-scale, and every effort will be made to bring the protocols into force internationally as soon as possible.'

Britain has good record of marine safety

In comparison with other countries the UK has a very good record as far as shipping casualties are concerned. This, and the fact that statistical evidence does not support the idea that large tankers are most likely to have serious accidents, are the main conclusions of an article 'Marine Safety Statistics' by John Archer, head of marine division, Department of Trade published in *Nautical Review*, 20 February.

The study examines some of the different marine safety statistics which are available and points out the ways in which they are used. Any statistical analysis of vessel casualties, the study points out, must depend on the extent to which incidents are reported. Information on inshore fishing vessels is known to be especially incomplete and efforts are being made to improve the figures. Incidents involving tankers, on the other hand, are well documented as a result of the work of the tanker casualty sub-group set up originally by the Department of Trade, and now working under the aegis of the International Maritime Consultative Organisation.

The work of this sub-group has led to the conclusion that casualty rates do not increase with size of tanker and, furthermore, that since 1972 the largest size category of tanker has had the lowest rate of serious casualties. There is little variation between countries in the rate of serious casualties to tankers although the United Kingdom, France and Japan have lower rates of total losses.

Between June 1963 and June 1967 there were 49 collisions in the Dover Strait. Following the establishment of a traffic separation scheme for the area in June 1967 and the extension of the scheme in April 1972 the number of collisions has fallen to an average of six or less a year since 1972 and only three in 1977.

Italian food buyers visit Britain

Italian food buyers visited London from 22 to 24 February to taste the delights of British foods. Left is Peter Johnson of Robertson Foods Ltd with one of the 41 Italian visitors on the mission, discussing the merits of the company's products during a special sample show at the World Trade Centre. The mission was arranged by the British Food Export Council in association with the British Overseas Trade Board.

ECGD statutory return

The Export Guarantees Act 1975 as amended is the principal legislation under which the Export Credits Guarantee Department (ECGD) operates. In insuring new UK investment overseas against certain non-commercial risks it operates under the Overseas Investment and Export Guarantees Act 1972. The report to end December 1977, below, lists commitments under the 1975 act as amended, and under the 1972 act.

COMMITMENTS UNDER THE EXPORT GUARANTEES ACT 1975 AS AMENDED BY THE INTERNATIONAL FINANCE, TRADE AND AID ACT 1977

New guarantees and liabilities in quarter ended 31 December 1977

The aggregate amount of new guarantees issued involving sterling liabilities under the 1975 act amounted to: £729 million under section 1, £516 million under section 2(1); and the aggregate amount of new liabilities incurred under section 5 of the act was a total of £1,245 million.

The aggregate amount of new guarantees involving foreign currency liabilities amounted to: SDR 138 million under section 1 and SDR 185 million under section 2(1); a total of SDR 323 million.

These represent ECGD's maximum liabilities under new guarantees issued during the quarter. The continuing validity of many guarantees issued prior to the quarter is not reflected here, but is covered in the liabilities totals below.

Amounts recorded against ECGD's statutory limits as at 31 December 1977

Total outstanding sums recorded against the sterling limit of £25,000 million under section 6 amounted to £19,996 million.

The following items are taken into account:

1 Liabilities in respect of guarantees under section 1 – £12,296 million.
2 Liabilities in respect of guarantees under section 2(1) – £5,631 million.
3 Amount of principal monies due under arrangements made under section 2(2) nil.
4 Amount of principal monies outstanding in respect of loans made under section 3(1) – £2,170 million.
5 Sums paid in respect of securities acquired and for the time being held under section 4 – £153 million.
6 Liabilities in respect of arrangements made under section 5 – £43 million.

The aggregate of 1 to 6 above will exceed the total liability to the extent that guarantees to banks may have been given under a different section from the related credit insurance guarantees.

Total outstanding sums recorded against the SDR limit of 10 000 million SDR under section 6 amounted, after revaluation, to SDR 728 million.

The following items are taken into account:

1 Liabilities in respect of guarantees under section 1 – SDR 224 million.
2 Liabilities in respect of guarantees under section 2(1) – SDR 504 million.
3 Amount of principal monies due under arrangements made under section 2(2) – nil.

Notes

Guarantees are given under section 1 after consultation with the Export Guarantees Advisory Council. Guarantees under section 2(1) are those given in the national interest.

Section 2(2) enables ECGD to provide financial facilities (eg to make payments to match foreign competition on unusual credit terms and to enter into foreign currency loans should the need arise).

Section 3(1) enables ECGD to refinance banks which make finance available on special fixed interest rates for exports sold on credit terms of two years or more.

Section 4 enables ECGD to make finance available to acquire, hold and dispose of securities. This was used to provide aid loans before this function was transferred to the Ministry of Overseas Development.

Section 5 enables ECGD to give cost escalation cover.

OVERSEAS INVESTMENT AND EXPORT GUARANTEES ACT 1972

Liabilities in quarter ended 31 December 1977

During the quarter the aggregate amount of liabilities incurred was £2.4 million. This represents ECGD's maximum liabilities under agreements entered into during the quarter.

Amounts recorded against ECGD's statutory limit as at 31 December 1977

Total outstanding sums recorded against the limit of £250 million under section 2(4) of the 1972 act amounted to £67 million.

Tariff quota: coated paper

Reopening of 1977 tariff quota no. 2745 – certain coated etc. paper and board of 1977 tariff subheading 48.07B (now 48.07C) imported from Switzerland. Inquiries by HM Customs and Excise have established that the 1977 tariff quota for coated etc. paper and board, other than coated printing paper, of tariff subheading 48.07B (now 48.07C) imported from Switzerland (serial no. 2745) was incorrectly exhausted on 11 May 1977. The department is, therefore, reopening this quota with an initial amount of 166 762 kg.

Retrospective claims relating to goods entered to home use or free circulation on entries or free circulation warrants presented on or after 11 May 1977 should be sent direct to the Central Tariff Quota Unit, HM Customs and Excise, Room 260, King's Beam House, Mark Lane, London EC3R 7HE quoting the following details:

1 port of importation } or name and address
2 name of ship and date of report } of warehouse
3 entry of free circulation warrant number and date
4 entered quantity (kg)

These claims must be submitted to the quota unit by 30 April 1978. Allocation of the quota will be effected as soon as possible after this date.

Inward mission from Oman visits building centre

Members of an inward mission from the Sultanate of Oman at the Building Centre, left to right, Philip Taber from the Shanfari Trading and Contracting Company construction division); Ahmed Mohsin, director, Getco Group of Companies, importers and distributors of building materials; Aflah H. S. Al-Rawahy, manager, National Engineering and Contracting Company; and A. H. Ali, director, Triad (Oman) architects, engineers' and planners. This mission visited Britain from 20 to 25 February, and was organised by the Building Centre and the British Overseas Trade Board.

Mission to Israel organised

The British Overseas Trade Group for Israel in conjunction with the British Overseas Trade Board is organising an outward mission from 3 to 11 June 1978, to Israel. This allows for 5½ working days and 1½ days for additional appointments.

The mission will be based on the Hilton Hotel in Tel Aviv and, including economy class return air fares, will cost £315 bed and breakfast in twin-bedded rooms (with bath) or £403 for single room (with bath). A grant of £195 is provided by the BOTB.

UK exports to Israel amounted to more than £270 million in 1977.

Representatives of the chemical, electronics and data processing industries would be particularly welcome on the mission. Companies interested in collaborating with Israeli firms in research and development are also invited to apply.

It is necessary to make detailed arrangements as soon as possible. Interested companies are therefore invited to contact, not later than 10 March, The British Overseas Trade Group for Israel, Michael House, Baker Street, London W1A 1DN, tel. 01-395 4422 ext. 7477, telex, 28865.

Revised editions of hints to business men

Revised editions of the booklets on Uruguay and the Republic of Zaire have been published in the *Hints to business men* series. British business men who intend visiting these countries on export business can obtain copies of the booklets from Export Services and Promotions Division, Department of Trade, Room D 05, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7145/6, or any regional office of the Department of Industry.

Advertisements are accepted for all booklets in the series which covers over 100 countries. Inquiries about advertising should be addressed to Cheiron Press Ltd, 8/10 Parkway, London NW1 7AD, tel. 01-267 1285.

Go for growth: invest in Britain

Trade and Industry special report

MERSEYSUCCESS

Football is not the only success of Liverpool. In 1977 new firms from Sweden, Germany and the U.S.A. joined the many successful companies already established there. These include the vast Unilever group and 38 American companies.

Liverpool has Britain's largest export port, and Hull on the east coast is now easily reached by the new motorway (M62).

Companies moving to the area receive the highest government grants for new buildings and machinery as well as tax concessions.

INVITATION

On your next journey to London visit Merseyside's London office at 5 Chancery Lane, London WC2A 1LH

Tel. 01-405 0488

or write to: MIDO, Merseyside County Council, Old Hall Street, Liverpool L69 3EL

Trade and Industry special report on the opportunities and incentives for industrial growth in Britain

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Go for growth: invest in Britain

Trade and Industry special report published with 3 March 1978 issue

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SOME PEOPL
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Coca-Cola do it. Volkswagen do it. Rank Xerox do it.

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May we suggest that it's also

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But it takes imagination to see Milton Keynes. It's an ideal as much as a place.

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It's an ideal that already works in practice. Which brings us back to the names we started with.

And the encouraging thought that the field is still wide open.

MILTON KEYNES

Go for growth: invest in Britain

Britain is a good place in which to invest. Better now, perhaps, than ever before. And that is why firms and organisations throughout Europe looking for an overseas base are being asked to consider Britain as the host country for such an investment. Alan Williams, Minister of State, Department of Industry, explains the UK investment climate and Britain's Industrial Strategy.

I can understand, looking at the British record over the postwar period, that there will be questions and doubts over certain issues, and therefore in this special report we hope to paint the general background against which an investment in Britain would be taking place. Subsequent parts of the report go into considerable detail on incentives, sites and the many other aspects of an investment decision that are relevant to anyone considering investing in Britain. But obviously, the most important aspect, is the climate in which the investment takes place – the general economic environment.

Our environment since the war, to put it mildly, has been slightly unpredictable. Unlike our European colleagues, we have not had a period of continuous growth. Our problem, in part the result of trade and currency difficulties which are now increasingly affecting other countries in Europe, have led to what we in Britain have described as the 'stop-go' situation.

Britain is now very fortunate in having its own oil, and of course substantial coal and natural gas resources. But apart from these, almost all our raw materials have to be imported, including half our food-stuffs. So we still have no alternative but to be a trading nation.

In the postwar period Britain fulfilled the role of a trading nation, with what was probably in hindsight an undue economic disadvantage. As a massive importer, we also had a currency which was the world's major medium of foreign exchange. Because of this, every time we ran into balance of payments difficulties, it has only needed a relatively small number of sterling holders to put pressure on the currency to oblige a

British chancellor to apply the brakes, putting the entire economy into 'reverse', or at least to 'stop'. This is a main difference in our postwar economic history compared with that of our major competitors, and it explains some of the paradoxes of the British economic scene.

Any businessman thinking of coming to invest in Britain asks questions about productivity. The phenomenon of 'stop-go' has undoubtedly affected productivity in British industry. Until this present recession, an American working man near to retirement will never have known a real setback in employment, because the USA has been on a virtually continuous growth path since before the war. And since the early 1950s, West Germany has also had a quarter of a century of virtually continuous growth, so that redundancy has represented no threat at all, because it has been easy enough for people to accept redundancy payments and move to comparable, equally well-paid jobs elsewhere. But in an economic environment such as Britain's since the war, there has naturally been a reluctance to accept redundancy or to accept new investment that could lead to redundancy. Historically, established British industry has had a defensive approach to manning levels and redundancy, but I believe that this atmosphere is now changing because the major constraints have disappeared.

In general terms, productivity in British industry is not low, and in virtually every sector of British industry you can find firms whose productivity is as high as that in competitor countries.

A new firm coming to Britain can start up without any difficulty at the highest international level of productivity by negotiating appropriate manning levels and working procedures. For the new enterprise, there is no problem as far as productivity is concerned; indeed, there is actually an advantage, because Britain is one of the lowest wage cost countries in Europe.

Productivity in Britain, according to OECD figures for the period 1969-73, is improving at the rate of 4½ per cent a year, the same as in West Germany. So a new firm can quickly achieve high productivity and thereafter maintain that level, while enjoying the advantages of lower labour costs than in most other parts of Europe.

Superimposed on these long-term difficulties we have had the short-term problem of inflation, which again has been slightly different from that of our continental partners. For several years up to 1974, Britain operated a statutory wages policy. Experience of the Western economies demonstrates, I think, that there are limited periods during which a statutory policy can be sustained. Anomalies and inequities eventually lead to attempts to break that policy down. In our case, we were in our third phase of a statutory policy, and it was about to break down at the very time – late 1973 – that the Middle East oil price increase hit the whole of the world economy. In Britain, wage cost inflation combined with world wide material cost inflation and the overall rate soared to 27 per cent, higher than any of our competitors, and quite untenable in the long term. The remarkable achievement is that, within the space of two years, on the basis of a voluntary incomes policy negotiated with our trade unions and almost universally observed, our rate of inflation is now down below 10 per cent, and there are hopes that it will remain so for the rest of 1978, so we believe that we now have this basic, short-term problem of inflation substantially under control.

We don't, of course, pretend there are no hazards. In the latest wage-round it is encouraging that so far over 95 per cent of employees covered by major settlements monitored by the Department of Employment, including the mineworkers, have settled within a 10 per cent band, although it would be foolish to pretend that some haven't challenged it. We are, after all, a democratic society which allows collective bargaining. But we definitely regard the prospects on inflation as encouraging.

The critical difference for Britain has come about as the result of an accident of geography, or rather geology. Britain has discovered enormous supplies of oil off its North Sea coast, and is Europe's main source of energy. And although, like several other countries in Europe, we have certain questions to resolve about the long-term future of our nuclear programme, by 1980 20 per cent of our electricity will be derived from nuclear sources. Furthermore, we have staggeringly large supplies of coal – 300 years' supplies at present rates of use – and we are now proving new resources of coal at almost four times the rate it is being consumed.

North Sea oil is already meeting half our domestic needs, and by 1980 will contribute over £5 billion a year to the British

balance of payments. This is why we can say with some confidence that the circumstances of our economic history in the postwar period, dominated by a highly vulnerable currency, are no longer relevant. For the next 20 years we can look forward to growth on a continuous pattern of the sort that West Germany and the United States have enjoyed, and of course we are confident that we will also achieve the change in attitudes within industry that have become apparent in those countries.

The oil resources in themselves are substantial. But we are not satisfied just to have the raw material value of those resources. The basic aim of our industrial strategy is to maximize the benefit to Britain of those resources. We don't just want the oil, we want the downstream activities too. We want to develop the feedstock and user industries.

But while we are justifiably optimistic about the macro-economic prospects over the next 20 years, we also recognise that the present optimism derives from a finite, limited resource. The oil, as it is consumed, will inevitably become a lesser factor in our economic fortunes.

Therefore the second aim of our Industrial Strategy is to divert a substantial part of the resources from the North Sea into our manufacturing industry. Twenty years ago Britain accounted for almost 20 per cent of world trade in manufactures, whereas today this figure has fallen below 9 per cent. We have moved more rapidly than our Western colleagues, although it is a common path, into the service sector. It is our determined intention to stop and reverse that drift so that we obtain a larger proportion of our gross national product from manufacturing industry. For this reason our policy is that manufacturing investment in Britain must have priority over all other claims on resources, even over our social objectives, for we have to recognise that eventually the level of manufacturing activity is going to determine the level of the social provision we can make for our people.

The Industrial Strategy has been developed as an attempt to obtain a consensus between management, trade unions, and government on the way ahead both for industry generally and for individual companies. The government can provide macro-economic information about the future, while industry and the unions carry out their assessment of market prospects; the three parties, organised in 40 industrial sector working parties, are together developing industrial strategies for each industry into the 1980s.

Already, if industry attains the targets identified by the Industrial Strategy, by 1980 they will be adding a further £2.5 billion annually to Britain's balance of payments. Even if that were to prove grossly optimistic, and industry attains only half the identified objectives, it would still represent substantial progress for Britain's manufacturing industry. But in general we don't believe that the stated objectives are wildly optimistic.

So we now have a co-operative attempt to plan the way ahead, involving people from both industry and government. But obviously the government has a major role to play to ensure not only that the right economic climate exists, but also that sufficient resources are available. We therefore have a comprehensive range of financial incentives for industry provided by government which are explained in detail elsewhere in this special report.

Firstly, I should emphasise that if a firm comes to Britain from overseas, it is treated as a British firm. It operates under no disadvantage as far as tax or incentives are concerned, and once in Britain is treated on exactly the same basis as our own companies. Incentives are available if a firm goes to one of the assisted areas, our areas for growth. These regions – virtually all of Wales, the north, north west and part of the south west of England, Scotland and Northern Ireland – are designated as growth areas because they have a plentiful supply of labour. They are areas where the traditional industries are either running down or being transformed because of technological change. Therefore, although they may be sustaining their output, they are shedding manpower.

Nearly half Britain's working population is in the assisted areas. There is plenty of labour available for those who wish to site a factory in them, and the Department of Industry gives very substantial incentives to such firms because they help us to fulfil our regional policy.

But we also have national incentives, apart from tax incentives. We have investment and modernisation schemes for particular sectors, such as foundries and textile machinery. Altogether, there are six such schemes, geared to the needs of both the individual industry, and the country, because we see them as industries which are important to the country in national terms.

In addition, we have one or two general schemes of assistance such as the selective investment scheme, which, unlike the individual industry schemes, is specifically intended for larger projects in any sector.

Another aspect of British life that inevitably arises on occasions is the question of industrial relations. In Britain we seem to

Swedish firm invests in Britain

Duni Bila Ltd, part of the Swedish Dūni Bila group, manufacturers of disposable plastics products, have taken a lease on a 2800 square metres factory unit on Runcorn's Whitehouse industrial estate. The unit will initially create jobs for 26 people and will produce plastic cups and glasses, tablecovers, napkins and placemats.

The company, who already occupy a sales office in Bramhall, Stockport, will move in office and distribution staff in May 1978 and will put in plant and machinery in June. It will receive the full range of grants available to companies locating in one of the government's special development areas, on buildings, plant and machinery, as well as interest relief grants.

The North West Industrial Development Association (Norwida) and Runcorn New Town Development Corporation are associated with Duni Bila's new factory development in Runcorn New Town. Norwida has been in close contact with Dūni Bila since 1973 when it visited the company's head office in Halmstad during a promotional campaign in Sweden.

Alan Williams (second from left) met Mr P. T. Funnell (left), works manager; Doug Hoyle, MP for Nelson and Colne; and William Kitching, foreman, at the Mullard glass factory, Simonstone in North East Lancashire on 23 February. Mullard Ltd are a wholly owned subsidiary of Phillips, the Dutch electrical and electronics company.

take a masochistic delight in displaying to the rest of the world, in the worst possible light, every industrial dispute that takes place in our country. Interestingly, over the three-year period 1972-74, some of the worst years in our history as far as industrial relations are concerned, we were still less affected in terms of strikes than Australia, Canada, Italy and the United States. In these three years only 5 per cent of British plants or establishments in the manufacturing sector experienced a strike at all, and in any one year, only 2 per cent experienced an industrial dispute. Furthermore, our industrial disputes tend to be concentrated in very narrow, much publicised sectors of industry, particularly those related to the automotive sector. The rest of British industry is in general very free from industrial action. A recent survey undertaken by a Scandinavian bank revealed that of 30 Scandinavian firms operating in the United Kingdom, 25 had never had a strike. Even the worst of the remaining five on average lost less than five working days a year, while the other four lost only a half or one full day. So the facts of our industrial relations are very different from the picture which is sometimes portrayed in our press, which concentrates on the dramatic strike record of one particular sector of industry. It is understandable that people overseas assume that this picture is repeated throughout industry generally, but the facts completely disprove it.

As a nation we have always welcomed inward investment, but not in a hypocritical, selfish sense, because in fact we invest more overseas than we receive. After the Americans, Britain is the world's largest exporter of capital. Since we entered the European Community, several times more British capital has gone into the Community than has been invested in Britain from the rest of the community. This is a traditional posture as far as Britain is concerned; we welcome both outward and inward investment. At present 15 per cent of our industry is overseas owned, two-thirds by the Americans. We welcome the overseas investor and treat him on exactly the same basis as any domestic British investor.

I hope that readers of this special report will be persuaded to look further at what we have to offer in Britain, perhaps to consider setting up an operation here. If there is any way in which I or my department can be of help, we will be delighted to do so.

Focal point: the IBB

Many foreign companies have established manufacturing facilities in Britain. Some have been here a long time. There is room for more. The Invest in Britain Bureau of the Department of Industry is the focal point of worldwide activity to encourage more inward investment into Britain, both by those foreign companies already established here and by newcomers.

Britain has always welcomed foreign investors – particularly those with manufacturing skills. In the years immediately following the last war many American companies came here and have made a success of their operations so much so that today the direct capital stake of United States companies in Britain accounts for something like 12 per cent of British manufacturing output, 9 per cent of the country's employment and some 16 per cent of British manufacturing exports.

But other countries have not invested to any great extent here and this really is rather strange when one bears in mind the overwhelmingly favourable experience of companies from overseas who have started operations in Britain in recent years. For example, in the latest two years for which figures are available, 1974 and 1975, Britain invested approximately three times as much in the other eight countries of the EEC than they jointly invested in Britain.

There is no reason why the UK's outward investment should not be equated by a corresponding amount of inward investment and the Department of Industry's Invest in Britain Bureau is leading the government's continuing activity to welcome and stimulate inward investment. The economy of the UK is poised for take off and there is much greater confidence in Britain. Location in Britain gives unrestricted access to a European market of well over 250 million people and the Invest in Britain Bureau's task is to stimulate interest in investment in the United Kingdom, to encourage the individual potential investor and, with the co-operation of the Department's regional offices, regional development organisations and local authorities, to help and guide him in finding the best possible location for his United Kingdom operation, taking account both of his needs and Britain's industrial and regional policies.

The bureau seeks out and encourages potential foreign investors both through individual company visits by its own members and the staff of the embassies and consulates general abroad, and through seminars, inward missions and other promotional activities in the principal business centres of the United States, Japan and Western European countries.

The seminars are mounted by the bureau in very close association with the embassy in the country concerned. Very often they are co-sponsored by an industrial federation, a bankers' association, an employers' federation or some other commercial body. Alan Williams, Minister of State at the Department of Industry takes every opportunity to speak at these seminars and, where appropriate, to attend the social events which may have been organised in association with the event. Other speakers include prominent trade unionists who outline the industrial relations situation in the United Kingdom, senior officials of the bureau, regional offices, and the various regional development associations. They talk on the regional set up in the United Kingdom and the investment climate; the financial and taxation incentives available to foreign investors; and the infrastructure and communications network. But perhaps the most important speaker at these seminars is the native from the country in which the seminar is being held who is managing a well-established manufacturing investment in the United Kingdom and who speaks to his compartiots about his experiences here. It is found that these particular talks are the most telling and do a great deal

Staff of the Invest in Britain Bureau

Director of the bureau: Cyril Silver 01-211 6466

The work is spread over three sections: Inward investment policy, research, promotional work and negotiations in relation to direct manufacturing investment in the United Kingdom.

Section A: all European companies

John Loder	01-211 3957
John Symes	01-211 5069
Ian Coveney	01-211 5277
John Pinnell	01-211 6786

Section B: all non-European companies

Brian Lodge	01-211 4464
David Baird	01-211 5201
Keith Newton	01-211 3139
Matthew Cruickshank	01-211 3115
Mike Tomlins	01-211 3584
Miriam Refson	01-211 3813

Section C: executive support for the bureau. Provision of booklets and publicity handouts. Briefing for overseas posts and co-ordination of briefing for inward and outward visits, seminars and missions. Co-ordination of inward investment activities of regional development bodies.

Joan Routledge	01-211 4720
Terry Holden	01-211 5762
Tom Corlett	01-211 4877
Laurence Nixon	01-211 3417

to dispel the somewhat dismal picture of life in Britain which has unfortunately gained credance, and there is no dearth of such speakers – they are very willing to come forward to speak for the UK bureau. These seminars are backed up by promotional literature, displays and films or slides specially prepared for the country in which the seminar is taking place. In 1977 five such seminars were held which were attended by almost 450 people. In 1978 it is planned to double the number of seminars – a further 10 are to be held.

From time to time seminars are held in London to acquaint foreign bankers, industrialists and chambers of commerce, to which potential investors might go for advice, of the benefits, tangible and intangible, of investing in the United Kingdom. The bureau also, on request, provides speakers for other occasions organised by overseas companies, chambers of commerce and consultants where knowledge on investment conditions in Britain can be usefully disseminated. Literature has been prepared on all the relevant facets of the United Kingdom and is available on request. It is widely disseminated to everyone who might have an interest in setting up manufacturing in the United Kingdom, and to those who advise them. The bureau is also responsible for the briefing and making arrangements for top level missions from foreign countries and for overseas ministerial and official visits in which the 'investment message' can be put across.

In short, the bureau is the focus of the United Kingdom's efforts to attract inward investment, through positive promotion efforts and through helping the foreign industrialists who are potential inward investors, to fulfil their needs in line with United Kingdom industrial aspirations.

Well timed visit to the United States

There is no substitute for personal contact is the first rule of any salesman. Cyril Silver, head of the Invest in Britain Bureau, illustrates the considerable effort being expended in promoting inward investment by the example of his timely visit to the United States.

I had last visited the United States in October 1976. The pound sterling was then falling – to the point where the conversation subject was not whether, but when, it would fall so low that the pound and the dollar were equated. Our balance of payments position was then in a disastrous state. In October 1976 the UK economy looked to many Americans as though it would never recover.

This time it was different. The pound was rising. The balance of payments was almost right and the North Sea oil was flowing. Phase two of the government's anti-inflation policy, which a year earlier the Americans had felt could not possibly last the full year, had not only held but the unions had accepted the 12-month rule, the government's 10 per cent guidelines were holding, and inflation really looked as though it would be down to single figures within weeks, if not months.

The difference was remarkable – and the difference in attitude of American businessmen was even more remarkable than the change round in our own economic position. In '76, there had been gloom and pessimism; in 1977, there was euphoria. In 1976, there had been resistance to investment in Britain not only because of the effect on their balance sheets of the falling pound but also because of fear for the future of investments in an economy which was thought to be collapsing. In 1977, if they had doubts about the UK, it was because the pound stood so high against the dollar that investment looked like being expensive, and low British wage costs did not seem quite so low when translated at what looked like becoming two dollars to the pound.

I went to the USA at the end of November 1977 for a two-week visit in which I was to call on American companies which seemed good inward investment prospects. In the event, I called on 34 companies in New York, Connecticut, Providence (RI), the Boston area, Cleveland (Ohio), Milwaukee, Minneapolis and Chicago. I should have visited more, but the weather was against me.

Despite the weather, I found the visit extremely useful. There was hardly a visit which was not value in some way or another – whether to cement further an already existing good relationship, to explore the possibility of an investment in the UK by a company already exporting here or to argue toughly the advantages of the UK with a company that was prejudiced against us and inclined to set up new projects in other European countries.

This kind of work by individual members of the bureau, by more senior officials, or by ministers is an invaluable adjunct to the continuous and systematic visiting programme of our embassy and consular posts in the United States and in other countries. However well briefed our people overseas are, there is an added dimension which can be opened up by someone who is in day to day contact with the industrial and economic situation in the UK. He can visualise and describe particular sites and factories and regions, and can give a quick off-the-cuff guess as to the sort of money that might be available, whether it be through section 7 of the Industry Act or through section 8 schemes, including the selective investment scheme. In one case, the company I visited had already decided at board level to put a project into the UK which might well have gone somewhere else on the continent of Europe. My visit came at the right time and helped push the company a little further in our direction. The other 33 cases have not yet resulted in decisions. But a surprising number of them have already made further contact in the two months since my return.

In the course of 1978, I expect to visit the United States again at least once, and other visits will be made by Ken Binning, who as head of regional industrial finance division of the Department of Industry, supervises the work of the bureau, by Brian Lodge and, for visits at more senior levels, by the minister of state, Alan Williams, and by Sir Peter Carey, the department's permanent secretary.

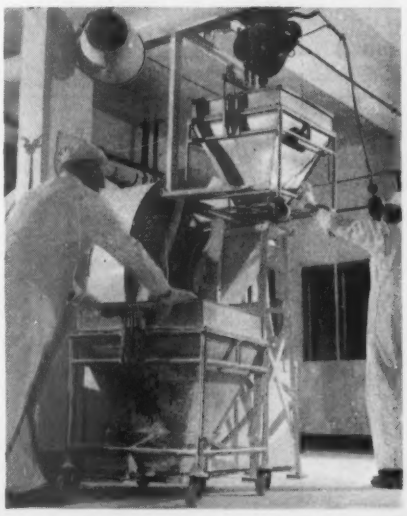
American companies who have any interest at all in setting up in Europe tend to think first of the UK. Second, they may think of the Republic of Ireland. Often their second thoughts are where their decisions takes them. This is a tribute not only to the tax holiday which can be given by the Irish Government, but also to the excellent operation of our rivals, the Irish Development Agency. We need to ensure that by every means possible the advantages of the UK as a good means to invest are presented to all potential investors. Visits like the one I paid to the United States are merely a small part of a major activity intended to do just that.

UK third most hard-working country

On the basis of an eight-hour day, West German workers do a fortnight less work a year than their much-maligned British counterparts. This is one of the surprising points thrown up by a survey carried out by Aktiv, 'the economic newspaper that everybody understands', which is published in Germany.

The Japanese, the survey shows, lead the world in terms of hours worked – an average of 2090 working hours a year in 1976. The Swiss were the second most hard-working nation, with an average of 1970 hours in 1976. British workers put in an average of 1960 hours and came third in the world work table. Tied in tenth place were the West Germans and the Danes with a 1855 hours working year.

Pharmaceutical production at Miles Laboratories Ltd, Bridgend. The firm, a subsidiary of Miles Laboratories Inc of Indiana, USA, came to South Wales 30 years ago and has expanded steadily ever since. The workforce at Bridgend has doubled over the past 10 years and now numbers 400.



Encouragement for expansion

The government is committed to encourage industrial expansion and development by creating an economic climate favourable to industry, and to reverse the relative decline of British industry by improving industrial performance and raising the growth of capacity. To support macro-economic measures, the government has a range of micro-economic measures which are operated within the overall policy of its industrial strategy. Among these, incentives to invest are the most important.

1 National schemes

Tax allowance for investment
Since October 1970, when the investment grant scheme was ended, the basic national incentive offered by the government to encourage investment has taken the form of accelerated depreciation allowances against taxation. Under the current system, tax allowances are given on a national basis without any regional differential.

Plant and machinery
The most important single incentive is the first year allowance for expenditure on plant and machinery. Since March 1972, up to 100 per cent of such expenditure can be set against profits for the year in which the expenditure is incurred.

Where a company does not have sufficient taxable capacity in an accounting period to absorb the whole of its first-year allowances, the excess may be carried forward indefinitely as a loss to set off against future profits arising from the trade, or carried back to set off against profits arising in the three previous years, or surrendered to other companies within the same group. Alternatively, the company may claim only part of the allowances in the first year, and carry forward the rest against future profits to be allowed at the rate of 25 per cent per annum on the reducing balance basis.

Industrial buildings
Complementary to the allowances for plant and machinery expenditure are the allowances given for expenditure on the construction of industrial buildings (including additions to existing industrial buildings).

The allowances consist of an initial allowance at the rate of 50 per cent (from November 1974), which can be claimed when the expenditure is incurred, and an annual writing-down allowance of 4 per cent of cost, which commences when the building is brought into use. The full expenditure will therefore generally be written off for tax purposes within 13 years.

Stock relief
Although not designed as an investment incentive, the stock relief, introduced by the Chancellor in 1974, is relevant here since, by reducing the cost to a company of holding stock, it can act as an incentive to higher stock levels or alternatively make more funds available for the company for other purposes.

Government's commitment to the present reliefs
In the course of his budget statement in April 1976, the Chancellor of the Exchequer promised that stock relief in some form would remain as a permanent feature of our tax system (confirmed in his budget statement in March 1977), and gave an assurance that the system of tax allowances for fixed investment would continue in its present form. The effect of these reliefs is that, at present, substantially the whole of the profits which a manufacturing company continues to re-invest in its business, whether by way of stock or plant, are effectively relieved from corporation tax.

Deferred taxation
Although the effect of all these allowances is to produce a cash flow benefit for the company by way of reduction in tax payable, the allowances are in principle a deferment of tax liability. In the case of stock relief the tax becomes payable if the stock value subsequently falls. In the case of allowances for fixed investment, because the tax depreciation has been effectively accelerated into the first year, the allowances in later years are correspondingly reduced: and when an asset is sold at a price exceeding its written-down value for tax purposes, a balancing charge will be made to recover excess allowances.

As the allowances are a deferment of tax liability rather than outright exemption, the provision for deferred tax liability in companies' accounts has caused some difficulty, and its treatment is currently under review.

Selective financial assistance under the Industry Act 1972
Selective financial assistance may be provided under section 7 and section 8 of the Industry Act 1972. Assistance under section 7 is provided for projects that create or safeguard employment in the assisted areas and is described in part 2 below. The criteria for assistance under section 8 are that the investment must be in the national interest and benefit the economy of the United Kingdom or a part of it; it is not limited to the assisted areas.

Assistance under section 8
Payments of assistance under section 8 now total about £200 million, and there are commitments to provide a further £375 million assistance. Over half of the total payments commitments have been made under the special schemes such as the accelerated projects scheme and schemes for particular industrial sectors described below, and the offshore supplies scheme; rescue cases such as Chrysler, British Leyland and Alfred Herbert have accounted for the balance, but are now a decreasing proportion.

Accelerated projects scheme
The accelerated projects scheme was introduced to encourage companies to bring forward projects in the recession which would otherwise have been deferred. Some 118 projects, with costs totalling about £640 million, were brought forward with assistance of £84 million to be paid as expenditure on the projects is carried out. This scheme has now been closed for applications and has been succeeded by the selective investment scheme.

Selective investment scheme
An initial allocation of £100 million to the new selective investment scheme was announced in December 1976 (increased to £125 million in February 1978), designed to promote investment projects which will, through improved performance, yield significant benefits to the economy. The scheme operates on a selective basis: applications are examined individually in their industrial context and against the aims of the government's industrial strategy. The scheme is directed towards manufacturing industry with particular attention to the engineering sector, but desirable projects from other sectors are eligible for consideration.

The principal criteria for assistance are that:

1 the company would not have undertaken the project on the basis proposed (in relation to its nature, scale or timing) in the absence of government assistance. Evidence justifying consideration may include a genuine and significant advancement in timing, a substantial increase in scale or efficiency, or a desirable extension of product range or marketing;

continued on page 25

North-West England

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"In our London Office we felt that our capability of expanding was becoming difficult. We did a survey of the United Kingdom and decided to settle in the Greater Manchester, North West area because in this particular area are the engineering skills which we use in our business."

Mr. Frank Smith, Fluor, (Great Britain).

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Mr. Jack Rigg, Chairman, Organics Division, ICI.

"The Industrial Grants played an important part in our decision to move to the North West. As a matter of fact, I guess we would consider them generous. They helped us in our effort to establish this new facility."

Mr. Reed Hamilton, Managing Director, Cooper Bessemer.

"The financial aid in the North West was very generous. At the time we were able to obtain 40% grants on all our capital investment."

Mr. Ralph Cross, Managing Director, Cross International.

"Educational needs in the North West are covered by a fine range of schools, technical colleges, polytechnics and Universities, including well known specialist business schools."

Mr. William P. Capper, Chairman, Capper-Neill.

"We have had success upon success both in labour relations and in the quality of our labour force. Productivity is higher than in our other factories in Western Europe. There is no doubt that the U.K. is one country where one can achieve a successful investment."

Mr. Colin Miller: Managing Director, Lundby Playtoys Ltd.

"In 1973 the company relocated its headquarters from London to the North West where a major part of the company was already established. The North West represented to the company an important industrial area in the United Kingdom offering excellent communications, access to good labour resources and lower property costs. The North West has, in practice, fulfilled all our original requirements and the company continues to prosper and expand."

Mr. Walter Maack, Managing Director, BASF.

"We have got a very good labour force here in Manchester."

Mr. Egil Schjolberg: Elkem-Spigerverket

Find out more about your company's prospects in North West England. Contact Clifford Chapman of Norwida for free, up-to-the-minute advice and for your copy of 'North West England... the facts'–a detailed dossier on Government Aid, Communications, Labour, Education, Housing and Services.

North West

To: Clifford F. Chapman, Director, North West Industrial Development Association, Brazennose House, Brazennose Street, Manchester M2 5AZ. Tel: 061-834 6778.

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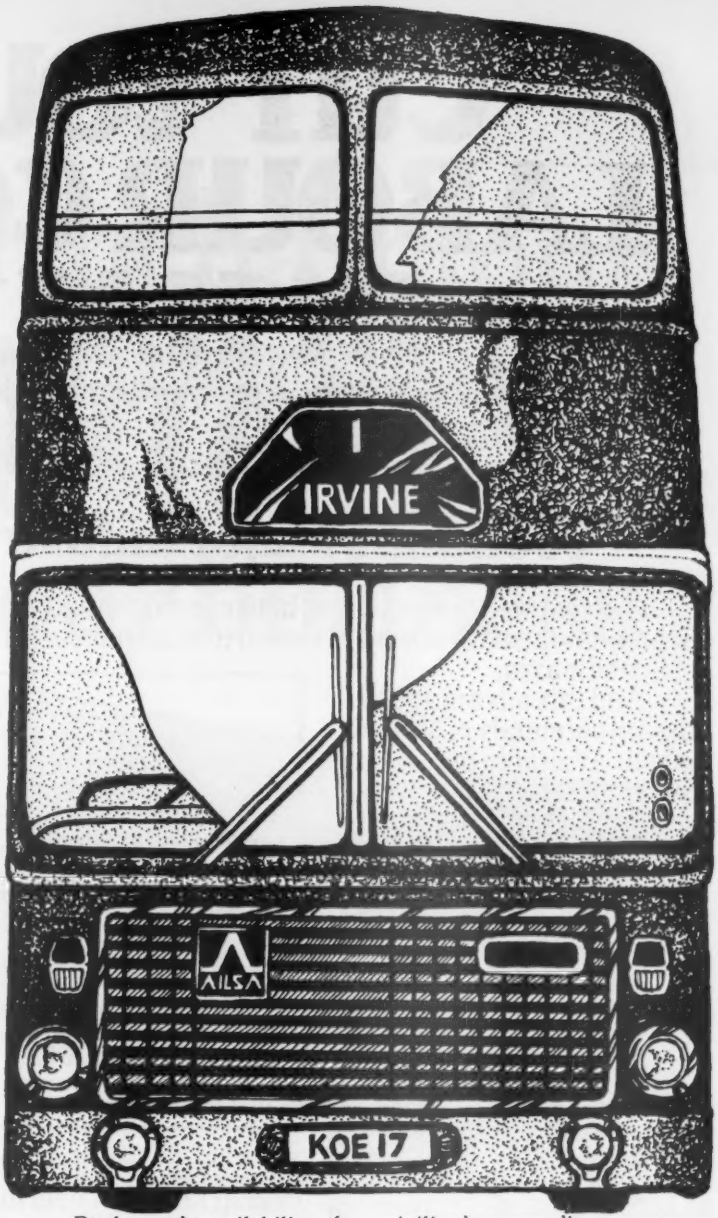

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For further information please contact: Michael S. Thomson, Commercial Director, Irvine Development Corporation, Perceton House, Irvine, Ayrshire KA11 2AL. Tel: Irvine 74100 Telex: 778984

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Seaports
The main ports of the Region are Stranraer and Cairnryan; the termini of the short sea routes between Scotland and Ireland.

Roads
The A75 trunk traverses most of the Region from east to west and a system of trunk roads radiates throughout the areas from the major centres of population.

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Contact:
Alan Anderson,
Regional Industrial Development Officer,
Dumfries & Galloway Regional Council,
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Telephone: 0387 - 61769

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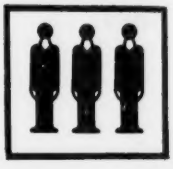

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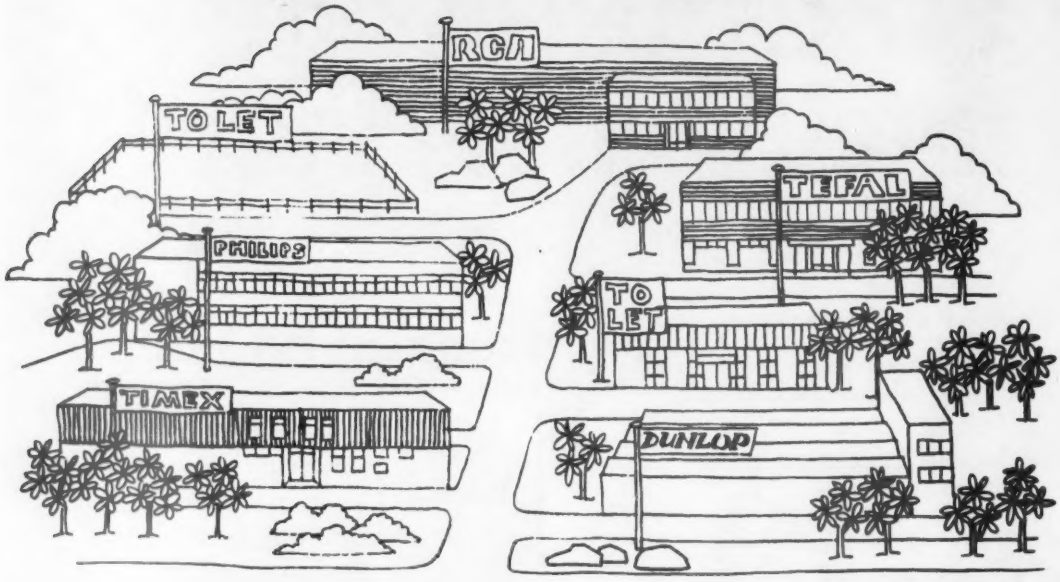

It's closer than you think . . . here in the North East of England we're helping the tiny settlement that was the world's first Washington to grow into one of Britain's best new towns. One of our jobs is to attract industry to the North East – and since we've helped nearly 150 companies to relocate here in the last 10 years, we've had plenty of practice – both in giving advice and coping with the practical problems of relocation. Our team of experts offer the industrialist a comprehensive and efficient service from initial enquiry to final move (and afterwards). Advance factories from 1,500 sq. ft. upwards are available now . . . we can give advice on grants and incentives (we're in a Special Development Area) . . . the area has an abundant skilled labour supply . . . all this, and much more, since it's all within the framework of a thriving new town. We need more space than this to tell you about Washington . . . why not come and see for yourself what we've got to offer? – It's more than a greenfield site – and the A1(M) goes through the town. If you can convince us that your business has potential call us on the number below and we'll take you site-seeing tomorrow.

WASHINGTON DEVELOPMENT CORPORATION
Usworth Hall, Stephenson, District 12,
Washington, Tyne & Wear NE37 3HS.
Tel: Washington (0632) 463591
Telex: 537210 DCWASH G

P.S. We have an office in The World Trade Centre London.
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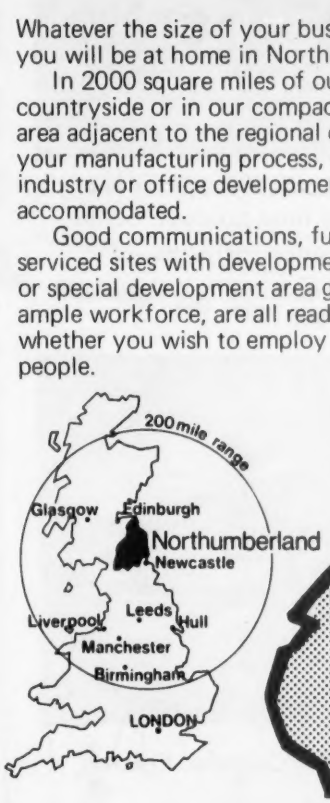
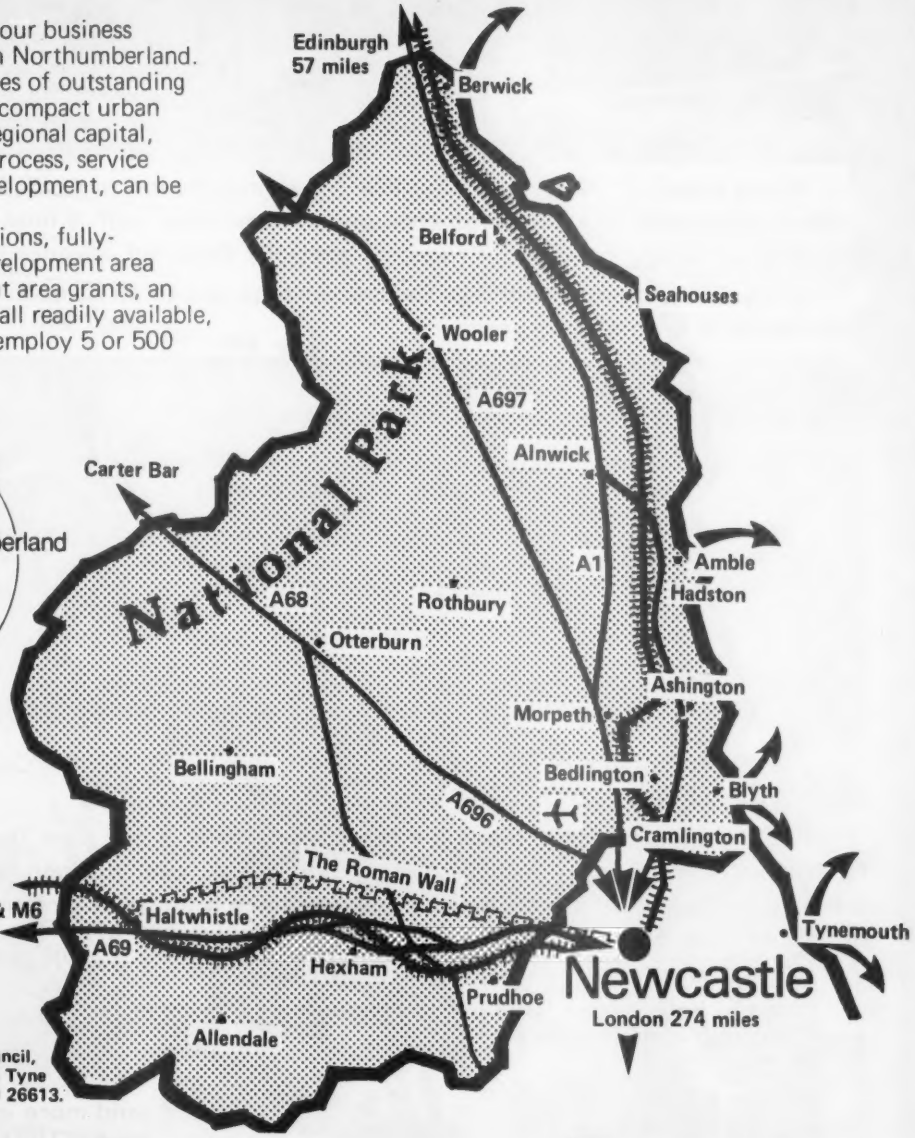
Good communications, fully-serviced sites with development area or special development area grants, an ample workforce, are all readily available, whether you wish to employ 5 or 500 people.





For more information contact:
J.E.Lodge,
County Planning Officer,
Northumberland County Council,
County Hall, Newcastle upon Tyne
NE1 1SA. Telephone: (0632) 26613.
Telex: 537048.

NORTHUMBERLAND County Council

A MEMBER COUNTY OF THE NORTH OF ENGLAND DEVELOPMENT COUNCIL

This plan is based on the O.S. map with the sanction of the Controller of H.M. Stationary Office.
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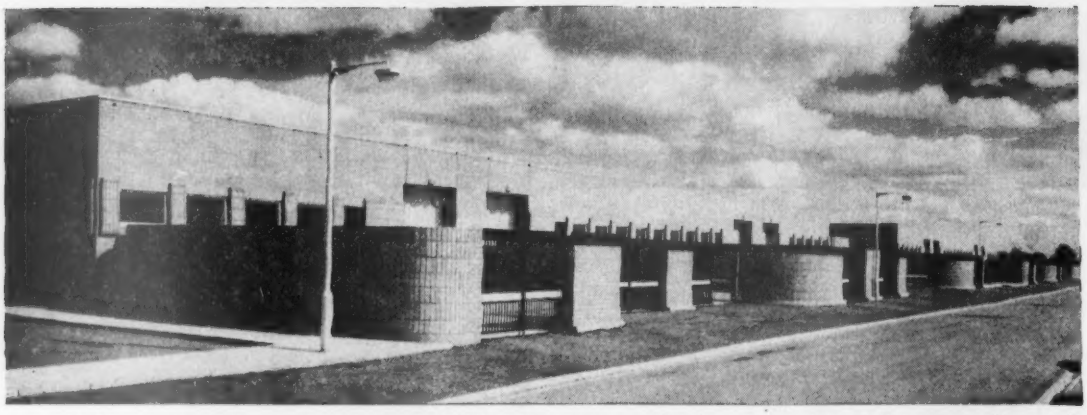
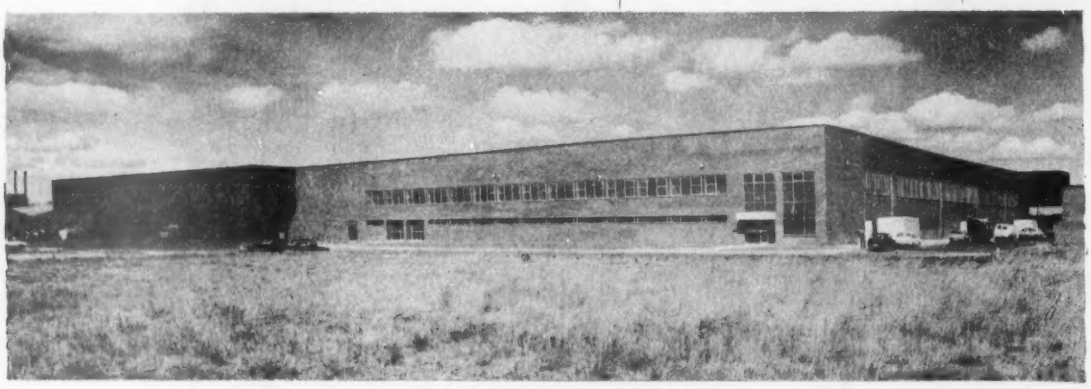
Aycliffe

Where ideas—and companies—grow



We're proud of ourselves in Aycliffe. In six months last year 86,000 square feet of factory space was taken by small companies. Some new, with a new product. Some growing painlessly through our range of specially designed advance factories.

In Aycliffe we know that new industrial ideas and small companies are the vital foundation of Britain's prosperity.



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And we are experts in helping you start and grow in our New Town in the modern North East. Aycliffe is on Britain's motorway network, near rail and sea container services to the rest of the UK and Europe. We have a range of modern factories and attractive sites, homes for your workers, and Development Area grants and incentives that could give you back more than 60% of your costs.

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To: Tony Cooper,
Director of Estates,
Aycliffe Development
Corporation,
AYCLIFFE,
County Durham.

Tel: Aycliffe (0325) 313221

Telex: 58428

Aycliffe
Where Ideas Grow

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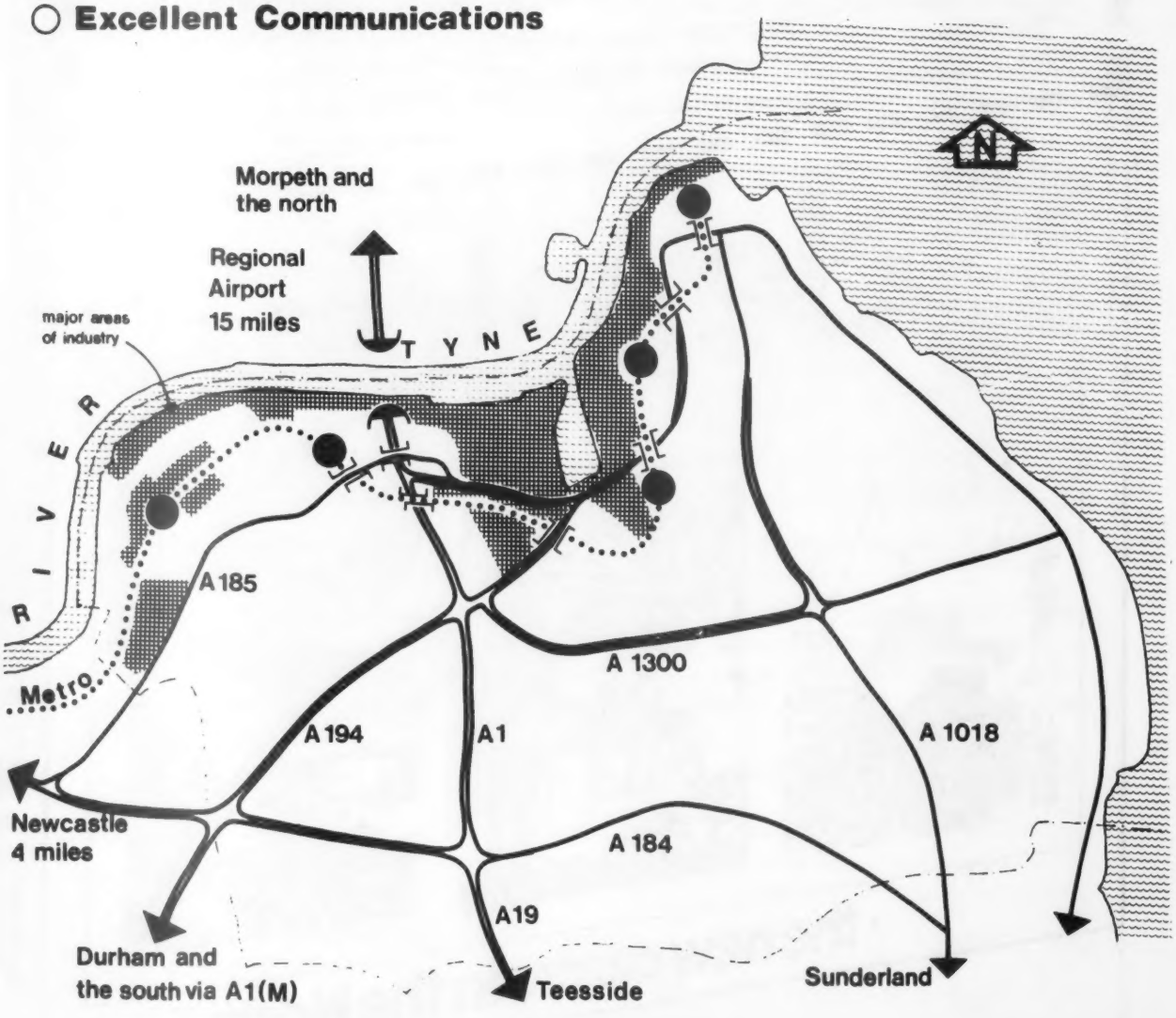


For further information please write to the **Chief Planner, Borough of South Tyneside**
Central Library, Catherine Street, South Shields, Tyne and Wear
or contact:
Peter Angus at the Planning Department Telephone: South Shields(0632) 567531

Yorkshire & Humberside is the CENTRE OF BRITAIN

The Yorkshire and Humberside Region is right in the Centre of Britain.

All parts of the British market are within easy reach as the Region lies astride the M 62, the best east-west route in the country, and has the M 1 and A 1 running north and south.

The Humber ports are ideally placed for trade with Europe and Scandinavia and access to westerly trade routes via Liverpool is a short motorway journey away.

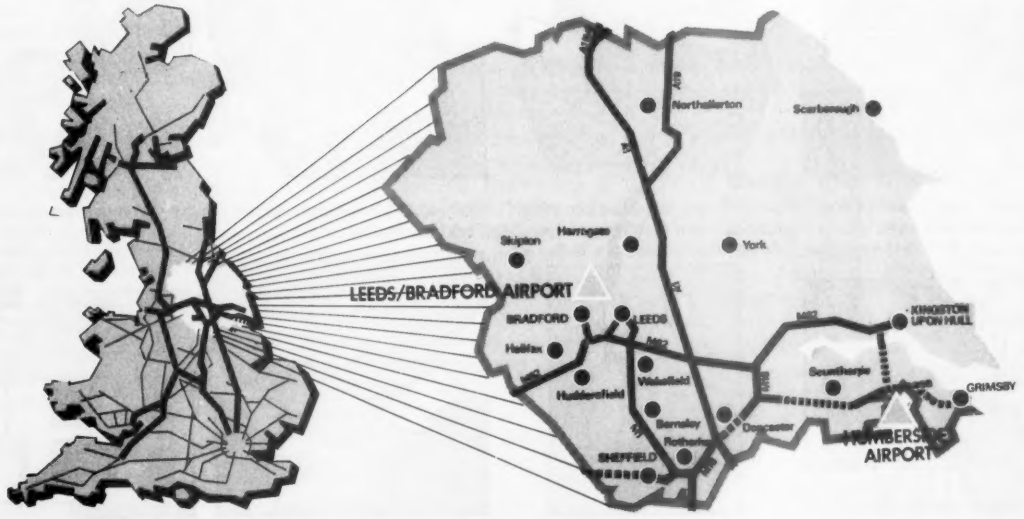
The wide variety of sites and premises in the Region means that every kind of industry can find a place here, and the workforce of 2 million people has a broad range of skills.

Grants and loans are available to help new industry start up and be profitable.

Talk to our executives who will be present at the IBB Seminars which are being held in Europe in 1978.

Come and see the Region for yourself by joining us as a guest on one of our special tours round the Region during 1978.

Fill in the Coupon below and send it to us. We will send you full details of the tours we are planning.



YORKSHIRE AND HUMBERSIDE DEVELOPMENT ASSOCIATION
CIVIC HALL
LEEDS LS1 3AZ

PLEASE SEND FULL DETAILS OF THE TOURS YOU ARE PLANNING

MY COMPANY.....

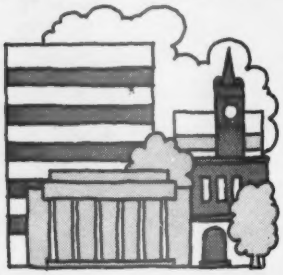
ADDRESS .....

.....

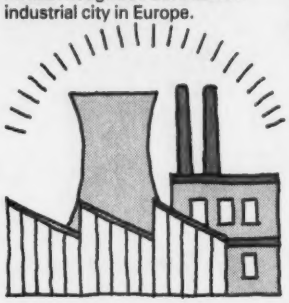
..... TEL .....

NAME ..... POSITION .....

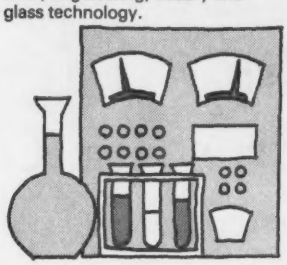
England's fourth largest City with a population of over 560,000.



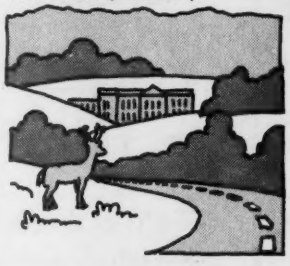
Acknowledged as the cleanest industrial city in Europe.



Internationally recognised for its research facilities, especially in steel, engineering, cutlery and glass technology.



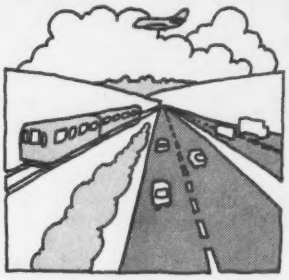
Adjacent to the Peak National Park, over 13,600 hectares being within the city boundary.



The centre of the special steels manufacture and allied engineering industries with major industrial complexes.

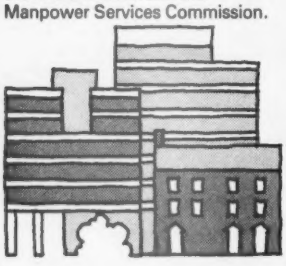
The most southerly of the major industrial centres to benefit from Government financial incentives.

Easily accessibile by road, by rail and by air.



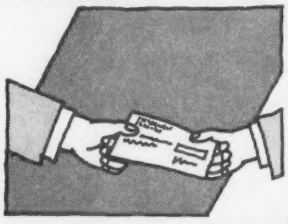
Able to offer industrial land and buildings at competitive rents or purchase prices.

A growing regional office centre with major organisations such as the Midland Bank and the Manpower Services Commission.

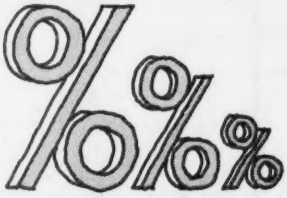


A foremost shopping centre with more departmental stores than any other city north of London.

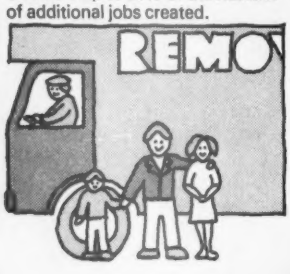
Regional Development Grants for manufacturing companies 20% of the capital costs for new or refurbished buildings plus associated fees.



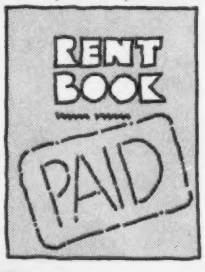
Selective Assistance for all types of industrial service and office developments.
Assistance can be by loans at concessionary rates or interest relief grants.



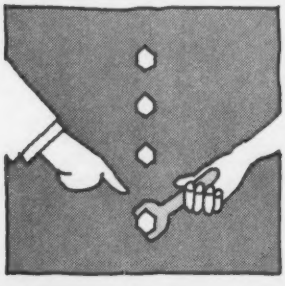
Service Industries receive £1,500 for each employee moved to Sheffield up to 50% of the number of additional jobs created.



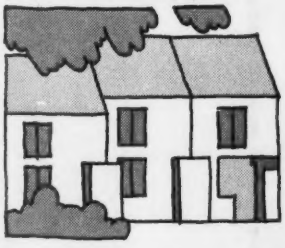
Other Grants to service industries include 3 year rent free periods. Removal expenses up to 80%.



Training is available through the TSA Skillcentre.



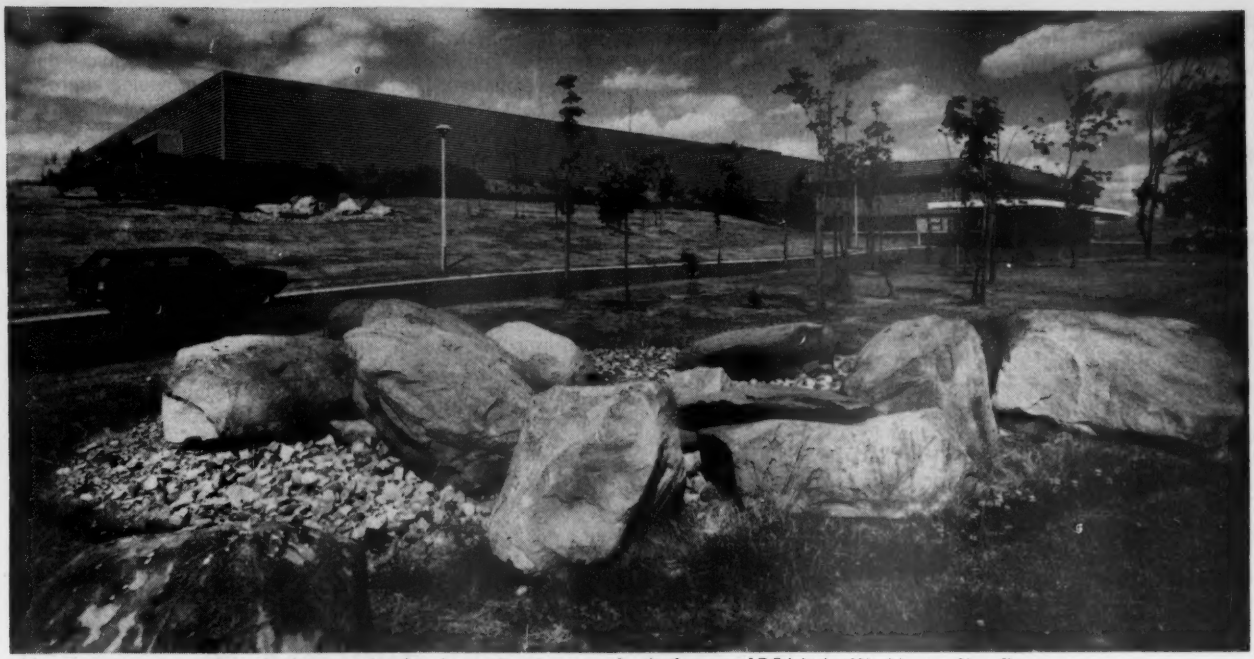
Key Worker Housing can be obtained from Sheffield City Council plus Government allowances for settling in.



Sheffield

The City of opportunities

Full details from: Michael Francis,
Industrial Development Officer, Estates Surveyors Department
City of Sheffield, Palatine Chambers, Pinstone Street,
Sheffield S1 2HN
Telephone: 0742 734563/5 Telex: 54243 (Industrial Development)



Many trees have been planted to improve the already good environment for the factory of RCA Ltd at Washington New Town.

Encouragement for expansion

continued from page 8

2 projects must be commercially viable and must result in a significant improvement in performance;
3 projects should normally involve new investment of at least £0.5 million including working capital and ancillary costs directly associated with the project.

The amount and terms of assistance are negotiated individually as the minimum necessary to bring about the additional benefits associated with the project. Account is also taken of the nature and scale of the investment, and the degree of risk, projected return and industrial policy advantages. The scheme thus enables the government to assist major projects particularly desirable from the national point of view, but which would not have proceeded on the basis proposed without the assistance.

Assistance under these schemes is normally in the form of a grant, usually an interest relief grant, and it is evident from the figures quoted above for the accelerated projects scheme that the amount of investment brought forward is many times greater than the amount of government assistance provided.

Industry schemes

Over £268 million has been allocated under section 8 of the Industry Act 1972 to be spent on schemes to assist individual industries. These schemes have been drawn up to meet the needs of particular industrial sectors. The purposes and conditions vary, but the common theme is to encourage modernisation and rationalisation. These schemes were drawn up in discussion with both sides of industry.

Industry schemes	Prospective commitments (£ million)
Offshore supplies	95
	Allocated (£ million)
Clothing*	15
Drop forging	5
Electronic components	20
Ferrous foundries*	80
Instrumentation and automation	10
Machine tools*	30
Non-ferrous foundries	20
Paper and board	23
Poultrymeat processing*	5
Printing machinery*	15
Redmeat slaughterhouses	20
Textile machinery*	20
Wool textiles*	5

*These schemes are now closed to new applications.

Administration of selective assistance

Within the Department of Industry there are a number of sponsoring divisions for the main sectors on industry; and close contacts are maintained by these divisions with their respective industries.

The divisions operate the industry schemes (though some are operated by regional offices and the poultry and red meat schemes in conjuction with the Ministry of Agriculture, Fisheries and Food). The Industrial Development Unit examines individual projects of over £0.5 million, and it runs the accelerated projects scheme and the selective investment scheme. Advice of the Industrial Development Advisory Board composed of senior businessmen and union representatives is sought on all important cases.

National Enterprise Board

The National Enterprise Board was established under the Industry Act 1975 with the principal objective of promoting efficency and international competitiveness in British industry. The NEB provides equity capital and loan finance for industrial investment; acts as a holding company for government shareholdings transferred to it and for new shareholdings it acquires; can help to restructure sectors of industry; and provides selective financial assistance to industry under the Industry Act 1972 when directed to do so by the secretary of state. The NEB is required to look for an adequate rate of return on all investments it makes on its own initiative. The NEB will have spent about £150 million up to the end of the financial year 1976-77 and will have an allocation of £275 million in 1977-78.

The NEB is required to give special consideration to areas of high unemployment when deciding where to expand an existing operation or locate a new undertaking. Directors have been appointed for the north and north-west, based in Newcastle and Liverpool, with the principal task of seeking out opportunities for NEB investment. So far only a small number have been identified, but steady progress is being made. The NEB is fully aware of the importance which the government attaches to its regional role; it seems likely, however, that,

for some time at least, the principal impact of NEB investment in the areas of high unemployment will come from the activities of the NEB's major subsidiaries.

2 Preferential regional assistance

Britain's industrial prosperity and growth in the nineteenth century was based predominantly on the coal, steel, heavy engineering and shipbuilding industries. These were largely concentrated in traditional industrial areas, and the decline in these industries has led to employment problems in particular parts of the country. The government has for many years pursued an active policy in favour of these regions, combining incentives to firms to expand in or move to areas experiencing serious structural unemployment or other economic problems with restraints on expansion on other areas.

The assisted areas
Assistance is given to encourage development in three categories of area within Great Britain: special development areas, development areas, and intermediate areas, and the level of assistance reflects the priorities of each of them. They cover the whole of Scotland and Wales, northern and north-west England, Yorkshire and Humberside, some small fringes of the Midlands, and Cornwall and part of Devon. (For assistance available in Northern Ireland, see part 3 below.)

Financial assistance to industry to invest in the assisted areas is essentially a package of incentives backed by the sanction of the industrial development certificate control. Within the package, the main forms of assistance to industry in the assisted areas are regional development grants, regional selective financial assistance under section 7 of the Industry Act 1972, and the provision of government factories. Negotiations with firms tend to cover the whole range of industrial incentives, and the specific schemes described below are additional to those described in part 1

Regional development grants
Regional development grants, introduced in 1972, make up the largest single item of expenditure on encouraging industrial investment in the assisted areas. Grants of 20 per cent and 22 per cent are available in the development and special development areas respectively towards the cost of buildings, works (excluding mining works), plant and machinery; and of 20 per cent on buildings and works only in the intermediate areas. These grants are restricted to expenditure incurred on new assets (except for certain adaptations of buildings) used on premises wholly or mainly engaged in qualifying activities, principally manufacturing. These grants, unlike selective grants under section 7 and section 8 of the Industry Act 1972, are not deducted from the company's expenditure when its tax allowances are calculated.

Regional selective financial assistance
Under section 7 of the Industry Act 1972 selective financial assistance is available in all the assisted areas. Interest relief grants (or in a minority of cases loans on favourable terms) are available for investment projects which create employment. Selective assistance is also available in certain circumstances for projects which will maintain employment that would otherwise be at risk. There are limits on the amount of assistance which can be given per job created or safeguarded as well as on the proportion of the cost of any project which can be met from public funds. Assistance is also available for the cost of moving administrative activities into the assisted areas.

Administrative arrangements for selective assistance
Responsibility for section 7 of the Industry Act is split between the Secretaries of State for Industry, Scotland and Wales, the Secretaries of State for Scotland and Wales being responsible for the administration of section 7 in their areas. In England the regional offices responsible for assisted areas handle most of the cases that arise under section 7 of the Industry Act. The formation of policy and those cases which are outside the delegated powers of the regional offices (which vary with the size and the experience of those offices) are handled at headquarters by regional industrial finance division. Regional offices, and in Scotland and Wales the Scottish and Welsh Offices, also carry out a good deal of processing and appraisal work on smaller cases that are assisted under the section 8 schemes. The Scottish and Welsh Offices and the regional offices of the Department of Industry both inside and outside the assisted areas also act as agents for other aspects of the department's work and for other departments, for instance on export promotion for the Department of Trade and on energy conservation for the Department of Energy.

Industrial development certificates
The industrial development certificate system backs up the incentives package by helping to steer developments to the special development and development areas. Outside these areas, new industrial building above a certain size requires a certificate from the department stating that the proposed development 'can be carried out consistently with the proper distribution of industry'. Legislation further requires due 'regard to the need for providing appropriate employment in the development areas'. The terms of the legislation provide wide discretion in the operation of the control. It confers a power to prevent development in certain places, not a power to direct to other places. The control does not apply to changes in the occupation of existing industrial building. However, the system provides the department with the opportunity of identifying projects which might reasonably be expected to locate in the special development and development areas and may also influence firms' location decisions for new projects.

3 Specialist assistance to industry in Northern Ireland

Northern Ireland enjoys many of the benefits of special development areas in Great Britain and overall fares better than SDAs in terms of incentives to encourage industrial investment. Selective employment payments are considered to have had a more positive effect on employment than did their equivalent in Great Britain, the regional employment premium, and therefore the decision has been taken to continue the scheme in Northern Ireland.

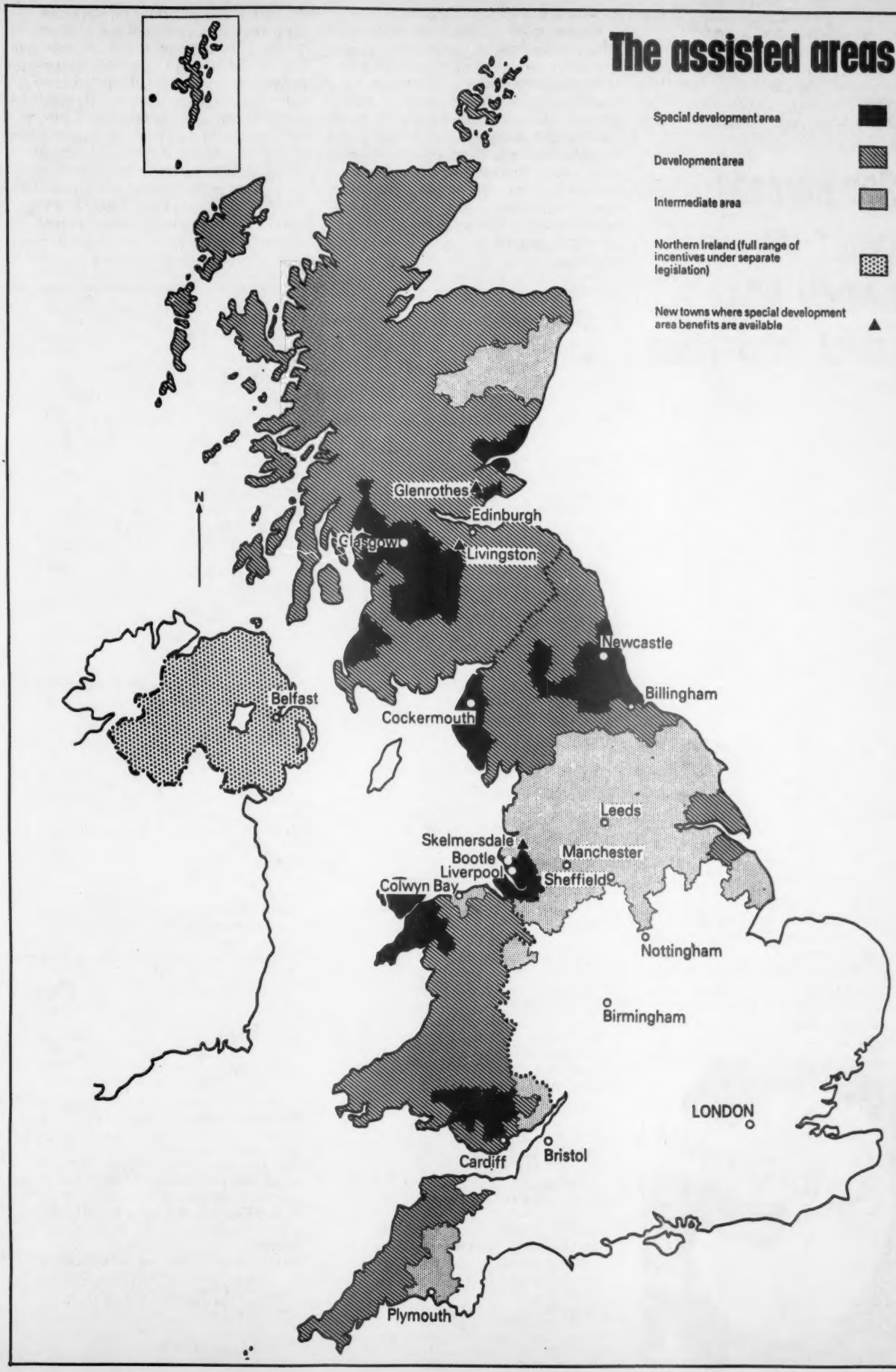
Selective assistance to industry, where the purpose is to maintain or promote employment, is given under the Industries Development (NI) Act 1966.

The types of assistance under this head are:

1 capital grants towards building and equipment costs of between 30 and 40 per cent depending on the type of case and areas; these grants are not deducted from the company's expenditure when its tax allowances are calculated;
2 loans on conditions and at rates of interest similar to those offered in Great Britain;
3 interest relief grants similar to those available in Great Britain;
4 removal grants of up to 100 per cent of the cost of transferring machinery from outside Northern Ireland and up to 75 per cent of the cost within Northern Ireland;
5 employment grants as a special inducement on a per capita basis.

Standard assistance, where there are no conditions relating to employment, is provided under the Industrial Investment (General Assistance) Acts (NI) 1966-71 and comes in two basic forms:

1 Capital grants of 30 per cent towards expenditure on new machinery, plant, equipment and buildings in manufacturing industry.
2 Discretionary loans or interest relief grants


The assisted areas
Special development area
Development area
Intermediate area
Northern Ireland (full range of incentives under separate legislation)
New towns where special development area benefits are available
N
Glenrothes
Edinburgh
Glasgow
Livingston
Newcastle
Billingham
Belfast
Cockermouth
Leeds
Skelmersdale
Bootle
Liverpool
Manchester
Sheffield
Colwyn Bay
Nottingham
Birmingham
LONDON
Cardiff
Bristol
Plymouth

for companies in receipt of capital grants for major rehousing and re-equipment schemes, up to a limit of 75 per cent of capital cost net of grant; loans are for eight to 15 years at the government loans fund rate (the same as the national loans funds rate) with a two-year interest-free period.

4 Government support for research and product innovation

The government provides research support for industry mainly through work at government research establishments, such as the National Physical Laboratory, and the funding of programmes at research associations. The current expenditure by the Department of Industry on general industrial research excluding aerospace is in the region of £40 million per annum. There is also direct support for the development of marketable products by individual companies, through the placing of collaborative development contracts and pre-production orders. The NRDC is a source of funds to secure the development and exploitation of inventions arising both in the public and private sector and RNDC support has generated many hundreds of millions of turnover of successful projects. The NRDC by statute is required to break even financially taking one year with another, and is therefore not a source of cheap money for industry, but is akin to a merchant bank.

Product and process development scheme
The government announced on 18 July 1977 that £20 million has been made available under the Science and Technology Act 1965 to assist the development of new products and processes by manufacturing industry. The assistance will go towards development costs from the design stage up to the point of commercial production. The emphasis will be on bringing new products and processes to the market.

Projects from any sector of manufacturing industry will be eligible for consideration, though the main thrust of the scheme will be towards mechanical and electrical engineering. Assistance will be given on a selective basis and will normally take the form of a grant of up to 25 per cent of qualifying costs or, as an alternative, a shared cost contract where the government will provide up to 50 per cent of qualifying costs in return for a levy on commercial sales. Support for pre-production orders will also be available under the scheme.

Advisory and information services
A number of government services offer information, and advice and assistance to industry, including small firms information centres and low-cost automation centres and the pilot technology advisory schemes being operated in the non-ferrous foundries and pumps and valves sectors. Most of the Industry Act schemes described above include provision to assist small companies to use consultants to advise them on improving productivity and efficiency. There is also an experimental counselling service for small firms in operation in the south-west region.

Contact points

Invest in Britain Bureau
Millbank Tower, Millbank,
London SW1P 4QU
Telephone: 01-211 4464/3597
Telex: 918829 DTI TOWER LDN

The Location of Offices Bureau
27 Chancery Lane,
London WC2A 1NS
Telephone: 01-405 2921

Regional offices
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Stanegate House, 2 Groat Market,
Newcastle upon Tyne NE1 1YN
Telephone: Newcastle upon Tyne 24722
Telex: 53178 DT1 NTYNE

Cumbria District Office
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Cumbria CA13 9NP
Telephone: Cockermouth 3498/9
Telex: 64173 DTI COCKERMOUTH

North Western
Sunley Building, Piccadilly Plaza,
Manchester M1 4BA
Telephone: Manchester 236 2171
Telex: 667104 DTI MCHR

Merseyside Sub-Office
1 Old Hall Street, Liverpool L3 9HJ
Telephone: Liverpool 236 5756
Telex: 628013 DTI LIVERPOOL

South West
The Pithay, Bristol BS1 2PB
Telephone: Bristol 291071
Telex: 44214 DTI BRISTOL

Location and selective financial assistance inquiries:
Phoenix House, Notte Street,
Plymouth PL1 2HF
Telephone: Plymouth 21891
Telex: 45494 DTI PLYMOUTH

Yorkshire and Humberside
Priestley House,
Park Row, Leeds LS1 5LF
Telephone: Leeds 443171
Telex: 557925 DTI LEEDS

East Midlands
Severns House,
20 Middle Pavement,
Nottingham NG1 7DW
Telephone: Nottingham 56181
Telex: 37143 DTI NOTTM

West Midlands
Ladywood House, Stephenson Street,
Birmingham B2 4DT
Telephone: Birmingham 632 4111
Telex: 337021 DTI BHAM

Scotland
Scottish Economic Planning Department
Alhambra House,
45 Waterloo Street,
Glasgow G2 6AT
Telephone: Glasgow 248 2855
Telex: 77583 DTI GLASGOW

and at

Caledonia House, 63-67 Academy Street,
Inverness IV1 1LU
Telephone: Inverness 30867/8/9

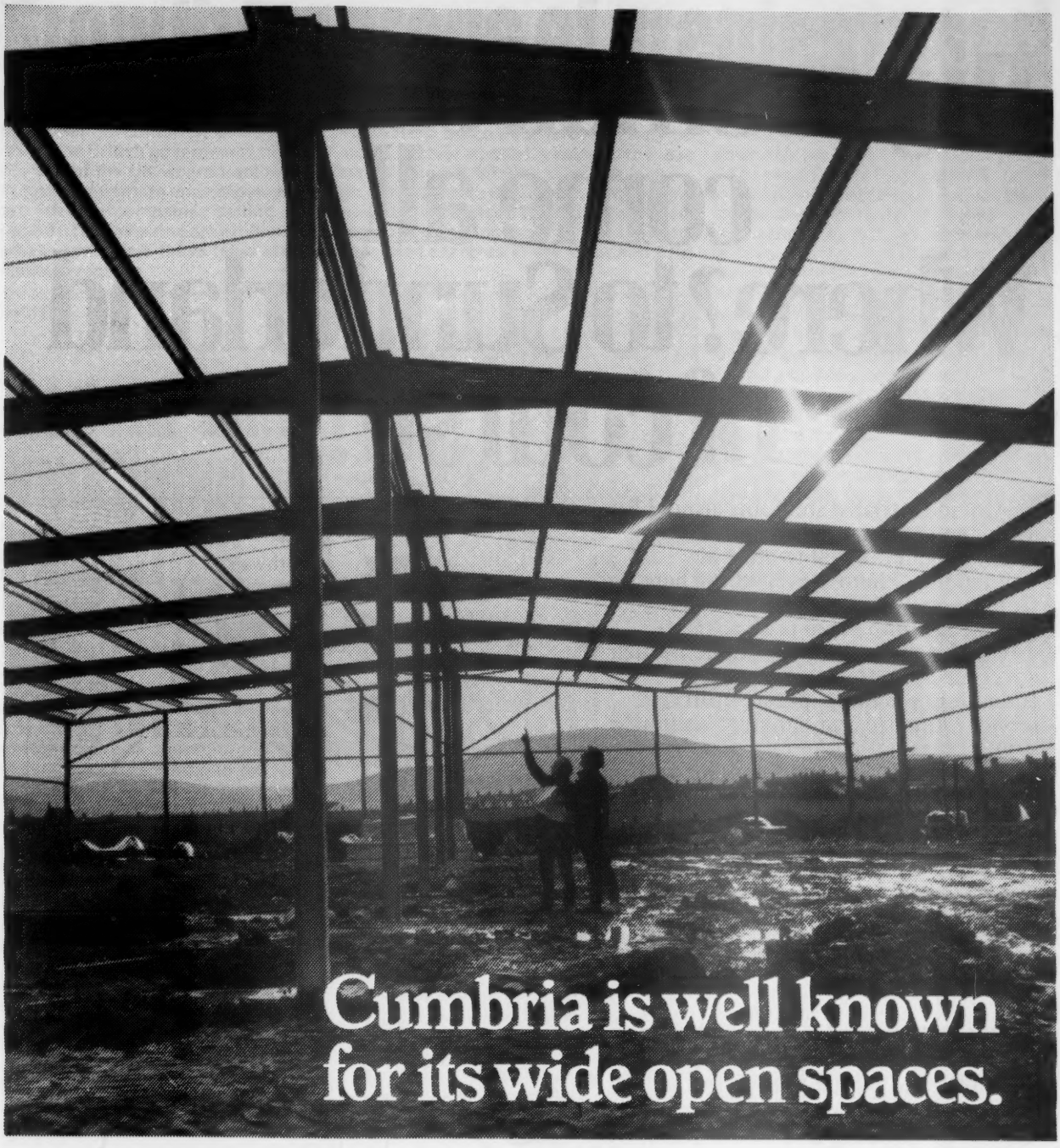
Wales
Welsh Office
Government Buildings,
Gabalfa, Cardiff CF4 4YL
Telephone: Cardiff 62131
Telex: 49267 DTI CARDIFF

and at

Government Buildings,
Dinerth Road, Colwyn Bay,
Clwyd LL28 4UL
Telephone: Colwyn Bay 44261

Northern Ireland
Belfast
Department of Commerce
Chichester House, 64 Chichester Street,
Belfast BT1 4JX, Northern Ireland
Telephone: Belfast 34488
Telex: 747025 GOVCOMM BELFAST

London
Northern Ireland Department of Commerce,
11 Berkeley Street, London W1X 6BU
Telephone: 01-493 0601
Telex: 21839 ULSTER OFF LDN



Industrial Cumbria can offer new, ready-built factories now. Rents are reasonable, with a possible five-year rent-free period.

A good supply of land is available and the County Council can make 20-year loans at favourable interest rates.

Government aid comes in the form of maximum development grants, loans or interest relief grants (cash payments to offset the cost of commercial borrowing), 100% first-year tax relief on new machinery and plant, removal grants (up to 80%), worker training schemes, and help with removal expenses for transferred workers.

A local labour force is ready and waiting – and keen to learn new skills. Many of Britain's leading companies know just how much this Cumbrian co-operation means to them. Electricity is available throughout the area and most of the County has natural gas. Water in Cumbria is amongst the least expensive in Britain and supplies are of first-rate quality.

In short, Industrial Cumbria offers financial and physical means to ensure the smooth transfer of your business from where you are to where your future prosperity lies.

Geographically speaking, the wide open spaces of Cumbria with their unlimited supply of clean air are within minutes of office, factory, and home. Many people now living and working in Cumbria realise for the first time that, even today, some of the best things in life are free.

Come and see for yourself.

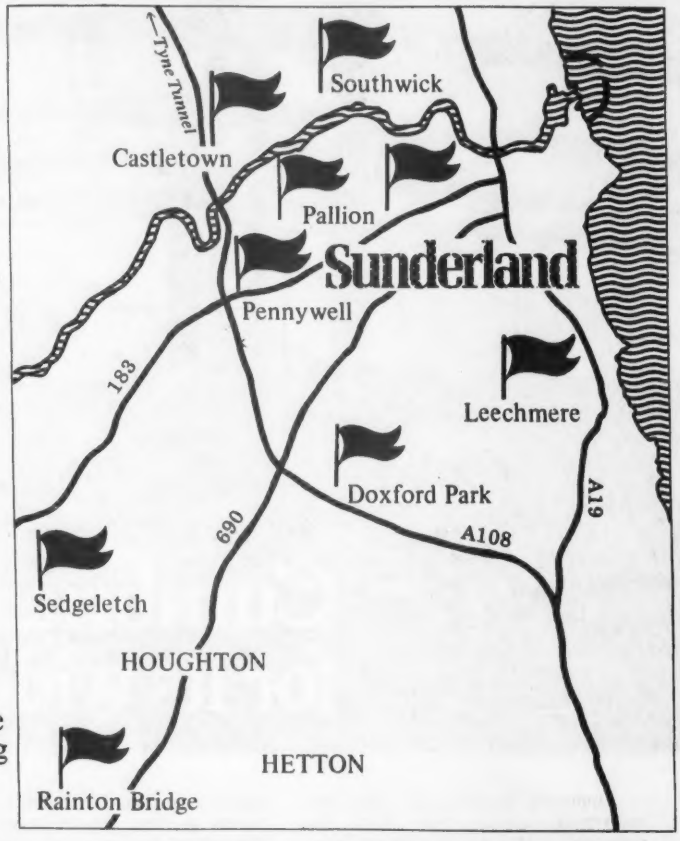
Ask your secretary to write to the address below, or ring Cumbria County Council on 0228 23456, for the latest information on what Cumbria can offer your Company in terms of land, buildings, rent, rates, grants, social and leisure amenities, outdoor life, and all the other things that add up to civilised living.

Industrial Promotion Unit,
Cumbria County Council,
15 Portland Square, Carlisle, CA1 1QQ.

Cumbria

Big or small come one, come all Where? to Sunderland of course!

Any industrialist shopping around for a new workshop nursery unit, factory or site would do well to start at Sunderland. There is everything here from a small workshop to a green field site. In addition there is an advisory service from the Borough Council which covers such matters as housing, education, planning, public utility services, finance and banking, insurance, supply of materials and services, port and airport facilities and contact with local professional services.



Workshops and factories of up to 25,000 square feet are currently available and whilst many are the subject of negotiation more are in the course of building and at the planning stage.

Sites are available at:–

Doxford Park. An estate linked to attractive modern housing to the south west of the inner urban area. Sites available for selected prestige developments only.
Leechmere West. A small estate adjacent to the coastal road (A19). Suitable for small industrial development.
Castletown. A new development in a superb location for industries requiring immediate access to the main A108 north-south dual carriageway and to Washington New Town.
Rainton Bridge. A total of some 150 acres for a single large development and projects requiring about 5 acres.
Washington. The New Town has a number of estates on which sites are still available.

Borough of Sunderland

For further information contact
Barry G. Syrett
Industrial Development Officer, Borough of Sunderland, Civic Centre, Sunderland.
SR2 7DN. Tel. 0783 76161 Telex 537037

Growth for areas of greatest need

Investment in Britain by overseas industrialists is welcome wherever it may be sited. The British government, however, seeks to steer mobile investment to those regions of the UK where traditional industries are contracting or which lack industry and where unemployment is high. Considerable financial incentives are provided for companies setting up manufacturing facilities in these areas (see page 8). The following are profiles of the regions containing the principal assisted areas. Apart from these there are small assisted enclaves in the West and East Midland regions.

North

Modern and traditional industries

Over 150 manufacturing establishments with overseas parents or associates are now operating successfully in the North of England with a total employment of almost 50 000 representing over 10 per cent of all employees in manufacturing. At present there are 13 countries with investments in manufacturing in the region.

The Northern region is made up of the five counties of Northumberland, Tyne and Wear, Cumbria, Durham and Cleveland. In its 15 000 square kilometres of territory live over 3 million people in a region of contrasts; heavy industrial areas, zones of outstanding natural beauty, coastal resorts, petrochemical complexes and new towns.

Tyne and Wear with 1.2 million people is the most heavily populated of the five counties. It is a focal point for many of the region's traditional industries such as heavy engineering, shipbuilding and marine engineering producing products. The major city in Tyne and Wear and the region is Newcastle upon Tyne and with its modern and thriving commercial centre it is a shopping magnet for Scandinavia with which the area has close historical and commercial links. There are two new towns in the Tyne and Wear area, Killingworth and Washington, and they have attracted new industries which are helping to create a balanced and diversified economy.

In the south of the region the County of Cleveland covers the Teeside area including the centres of Middlesbrough, Stockton, Hartlepool and Redcar. In the last 10 years this area has seen the continuing large investments in the chemical complexes around the Tees, in multi-million pound developments for the British Steel Corporation and for the North Sea Oil related industries. North Sea oil from Ekofisk comes some 340 kilometres under the sea by pipeline to the Phillips Petroleum terminal on Teesside.

Between Tyne and Wear and Cleveland is the County of Durham. This has a great mix of agriculture, old industries such as mining and an increasing incidence of new high technology firms particularly in the new towns of Aycliffe and Peterlee.

In the north of the region is the County of Northumberland. Although still richly agricultural it has the new town of Cramlington which has attracted many British and foreign companies. Northumberland has new industry such as the Alcan aluminium smelter. Cramlington New Town has also attracted new modern industry which now provides nearly 10 000 jobs.

The region's economic history is rooted in its basic industries of coal, iron and steel, shipbuilding and marine and heavy engineering. Declining employment on a large scale in these industries, particularly during the 1960's dictated government investment in the region on infrastructure and other measures to attract new industry.

As a result of the action taken the region is no longer solely dependent on its traditional industries for employment. Although the traditional industries are still important the North can now claim also to be a centre for industrial expansion in the field of chemicals, petrochemicals, plastic products, pharmaceuticals, modern textiles and a wide range of engineering products.

The region's labour force has adjusted extremely well to the rapid changes in the industrial structure and associated skilled requirements. The adjustment has been aided by the establishment of seven government Skillcentres which retrain about 25 000 men per year in more than 40 different occupations. The presence of a labour force with traditional skills and a readiness to acquire new ones has proved an attraction to the new firms and industries which have come to the region. This applies especially to the many foreign owned companies and subsidiaries which have located here.

Some Scandinavian companies which are represented in the region are Vald Birn and Grundfos A/S of Denmark; Molnlycke AB and Svenska AB Bromaregulator of Sweden; and Svertne Munck and Kenmore Inc A/S of Norway. Famous names from elsewhere include Black and Decker, Formica, Ronson, Phillips, Timex and RCA.

In these days of pressures in industrial and commercial life one of the greatest benefits the North of England can offer is the opportunity to relax and reduce the strain of the everyday routine. As a recreation centre, it has advantages few other regions can match. Vast tracks of open country give a new dimension to life with wild moorlands and hills to climb. In the west of the region there is the Lake District acknowledged to be one of the most attractive holiday centres in Britain.

Regional profile

Area km²	15 000
Persons per km²	203
Agricultural area km²	10 692
Population ('000)	
Males	1 528.6
Females	1 597.5
Live births (rate per 1 000 population	12.2
Deaths	12.3
Employment (June 1976)	
Employees in employment	1 254.7
Per cent in agriculture	1.3
Production industries	49.0
Service industries	49.7

North West

Industrial heartland

The North West is a region of fundamental importance to Britain's economic future: at the centre of Britain geographically; placed strategically at the focal point of a modern national and international communications network; and at the heart of one of the largest industrial concentrations in Western Europe.

The North West is many things to many people. In Department of Industry terms it is the region comprising the two large metropolitan counties of Greater Manchester and Merseyside, the Shire counties of Lancashire and Cheshire plus the Southern end of what is now the county of Cumbria – and the Peak District of Derbyshire.

It is a vibrant region, small in geographical area but large by most other standards. In a population of 6¾ million, it has a labour force approaching 3 million people with well over 1 million of those employed in manufacturing industry – 14 per cent of the UK total in the manufacturing sector. The region is thus densely populated and industrialised but the concentration is in the two main conurbations. Countryside, farm land and moorland, coastal resorts, lakes and mountains are within easy reach. The range of choice for residence or work extends from major cities to small villages.

The region's main industrial strength today lies in engineering. This is wide ranging, the mechanical engineering sector being noted for machinery and process plant for virtually every manufacturing industry and the electrical engineering sector covering most things from generating equipment and switchgear to consumer goods, electronics and computers. Major aircraft plants, modernised shipyards, diesel engine and motor industry plants – including Rolls-Royce – extend the range and the whole engineering industry is backed by a diverse component, material and subcontracting facility. Oil refining, chemicals and petrochemicals, textiles, glass, rubber, plastics, food and drink, paper are also prominent industries.

There is a profusion of thriving research and development establishments and science based firms in the region including not only private sector involvement but also several national research and development establishments.

The region is a strategic centre. Within a 160-kilometre radius there are 19 million people – about one-third of the UK population – and a half of total UK manufacturing activity. This in turn represents a substantial market offering a variety of opportunity for inward investment.

Perhaps the most single dramatic development in recent times has been the North West's share of the national motorway network, over a fifth of England's motorways, and that in a region comprising only 3 per cent of the UK's geographical area. This network is complimented by fast inter-city rail services and by freight liner services to many terminals throughout the country. Major dock systems at Manchester and Liverpool and Manchester's modern international gateway airport with daily direct services to Canada, USA and most leading Western European centres, complete the communications picture. But communications today means also telecommunications and the region can fulfil the most demanding requirements in that direction.

The region offers high calibre education facilities covering a wide range. The older universities of Manchester (including UMIST – the Institute of Science and Technology) and Liverpool together with the newer universities of Salford and Lancaster have strong practical links with industry. Polytechnics and colleges of further education, of which there are over 80 tactically placed throughout the region, offer a wide range of industrial, commercial and management courses.

Virtually the whole of the region is an assisted area of one kind or another be it development, special development or intermediate area and there is therefore a substantial range of government help available to new and expanding companies embracing financial incentives in the form of loans and grants and government built factories ready for occupation on a sale or lease basis. Four new towns, all connecting with the main motorway network have created potential new areas for industrial growth and with the spotlight now turning to inner city redevelopment other inducements of one kind or another are becoming available there. Office and service industries have an important part to play and inducements to that sector also apply in appropriate degree.

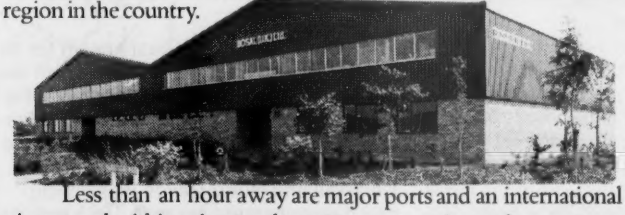
The total picture of the region is of a vital comprehensive industrial base but operating on a scale which allows specialism to flourish. It is backed by an experienced skilled labour force whose adaptability has been fully demonstrated by the rapid pace of change in the region over recent decades. This is a region which works hard and plays hard and one where the newcomer, private, industrial or commercial, will experience the welcome and hospitality for which the area is well known.

Lancing the furnace in the Manchester Steel mini-mill.

Ready-built factories and warehouses are available smack in the middle of Britain's motorway system.

Walton Summit, near Preston in Central Lancashire New Town, is one of the best placed industrial sites in Britain.

It has immediate connection to Interchange 29 on the M6 and is only four miles from the M61. This gives a company based at Walton Summit fast motorway access to every important industrial region in the country.



Less than an hour away are major ports and an international airport and within minutes a busy manager can be on the electrified Inter-City to London or Glasgow.

The workforce is highly skilled, with a very good labour relations record. As for young management, in addition to Preston Polytechnic, there are four universities an hour or less away.

Ready-built units are available in a range of sizes from 3,000 to 30,000 square feet, at competitive rentals. And fully serviced plots are ready now. All in an attractively landscaped setting.

Intermediate Area Grants are available for qualifying companies.

For details and brochures on this prime development, send the coupon to W. McNab, ARIC Commercial Director, Central Lancashire Development Corporation, Cuerden Hall, Bamber Bridge, Preston PR5 6AX. Tel: Preston (0772) 38211.

Name _____

Company _____

Position _____

Address _____

TI 3/

Central Lancashire
The foundation for your future.

Yorkshire and Humberside

Optimum centre for distribution

Astride historical and renewed and improved north-south and east-west trade routes and the trading axis linking central Britain and the continental heartland, Yorkshire and Humberside covers an area of 1 420 000 hectares, has a population of 4.9 million, and a workforce of 2.1 million. Its central position in Britain makes it an optimum national distribution point. The region has assured supplies of energy, steel and petrochemicals.

Sheffield is the nation's principal centre for the production of special steels. South Yorkshire, and Scunthorpe, also supply other types of steel. The region is therefore extremely strong as supplier to a wide variety of industries. The region's engineering, which covers an immense range of products, faces a favourable future. Some sectors are assisted by investment programmes in other sectors such as steel, coalmining, power generation, oil related developments and chemical process plant. The region's industries include machine tools, engineers' small tools, vehicle components, tractors, other mechanical, electrical and instrument engineering and a wide range of metal goods. Food processing industries, chemicals and allied industries, manufactures of coal and petroleum products, textiles, clothing, glass containers, paper and printing, timber, also form parts of a diverse manufacturing profile. Manufacturing provides 36 per cent of the total number of jobs, the balance being provided by a variety of service industries, mining, agriculture, and construction. Among its many advantages the region can point to strength in energy resources. Humberside is a landing point for North Sea gas and for oil. It has two oil refineries. There is a real prospect for further development of the chemical industry and substantial opportunities offer themselves to plastics industries wishing to supply the United Kingdom and European markets.

The importance of a co-ordinated land use and economic strategy to ensure successful development is recognised. A striking example of the awareness of the importance of physical planning linked to the needs of industry is provided by exploitation of continental shelf oil and gas. Yorkshire and Humberside is already benefiting as a supplier, through its great strength in special steels and engineering, to the offshore industry. Full utilisation of the potential of Humberside, for oil and petrochemical and associated industries, will require large areas of land for development and Yorkshire and Humberside offers great opportunities.

The region therefore has good prospects for economic development. In addition to the economic importance of its central position it can offer a large and varied skilled workforce, a strong manufacturing base, access through the Humber ports to other trading countries, important office centres in Leeds and Sheffield, five universities, three polytechnics and many technical and other educational establishments. The range of industry thriving within the region is a tribute to the skills of the stable labour force and the contributions of managements.

The expanded motorway network is consolidating the strength of Yorkshire as a national distribution point. The completion of the M62 during 1976 developed an east/west trading and industrial axis to rival the region's improved and long established north/south industrial advantage. Already a number of new industrial estates are being established at motorway access points, and this process will continue.

The region has very considerable areas of attractive countryside and a long and fine coastline. Improvements to the urban environment in older towns have been considerable, and progress includes the virtual completion of the clean air programme in major cities and very substantial rebuilding of town centres.

The region has succeeded in sustaining itself as an industrial decision centre including many top managements not confined to traditional industries. Job quality, diversity and the provision of additional employment opportunities are features in an overall strategy which recognises the importance of due consideration to economic and financial features affecting industries.

A primary objective of the region, increased long term economic prosperity, involves continuing encouragement of capability to generate self-sustained growth. This includes encouragement of more industrial investment, safeguarding economically viable jobs and providing new opportunities. Among items for progressive attention are strengthening and diversifying manufacturing industries, strengthening primary industries, and encouraging ancillary services and tourism with regard to the importance of retaining and winning management decision centres. Availability of suitably trained labour, trainable labour, and availability of appropriate sites to facilitate future developments are seen to be key and important requirements for consideration by potential developers, who may be British based or based overseas. Development may take the form of new factories, factory expansions, joint ventures between existing Yorkshire based firms and overseas firms licensing arrangements whereby a local licensee may expand at the same time introducing the products of another company.

South West

Impetus from communi-cations

In recent years the development of the South West assisted area has received considerable impetus from the building of the M4 and M5 motorways. The latter was extended to Exeter in 1977 and there is a dual carriageway almost to motorway standard through to Plymouth with good communications on into Cornwall. Plymouth also has an excellent ferry service to Roscoff in Brittany, and another to Brest which is about to be extended to Santander in North Spain.

The South West, while best known for its holiday industry and agriculture which are both very valuable to the region, nevertheless has an important manufacturing industry. In order to strengthen this sector and to provide more job opportunities most of Cornwall and North Devon were designated development areas in 1966 and the rest of Cornwall, the Plymouth area and West Devon were made intermediate areas in 1970.

Apart from Plymouth, with its population

of 240 000, the population is mainly located in small towns. The area is attractive to many sections of industry and since 1966 around 220 companies have moved to or opened branches in the South West assisted areas, employing approximately 12 000 people.

Over 30 foreign-owned companies, of which 12 are American, have found that the South West assisted area provides a good location to expand their operations. Subsidiaries of foreign firms who have successfully set up operations include such companies as International Chemical Co Ltd, a subsidiary of American Home Products Corporation, Delaware.

Manufacturing pharmaceutical products, cosmetics and toiletries, International Chemical moved to Wrafton near Barnstaple in 1971 and has performed well with a turnover in excess of £11 million of which over 20 per cent is exported. The production unit in the development area in North Devon moved from a number of sites in London. They brought with them 43 key staff and after 12 months were employing 400 people.

More recently, Pall Industrial Hydraulics Ltd, a subsidiary of Pall Corporation, USA, has recently occupied a government factory at Redruth, Cornwall, and the company also have a new factory under construction at Ilfracombe, both in the South West assisted area.

The South West assisted area is attractive with a good climate, pleasant countryside with many local amenities, and thus it provides pleasant surroundings for staff. From an industrial point of view it offers good labour relations while training and education is provided at the government Skill Centre at Plymouth which has an annexe at Redruth, the Polytechnic at Plymouth and technical colleges at Camborne-Redruth with an annexe at St Austell, Falmouth and Barnstaple.

The Department of Industry's South West Industrial Development Office is at Plymouth to help firms wishing to establish in the South West assisted areas where considerable government and local authority assistance is available.

Scotland

Exceptional opportunities for investment

The whole of Scotland is classified as an assisted area in relation to Government financial and other assistance, and large areas qualify for higher rates of incentives. Selective financial assistance under the 1972 Industry Act is administered by the Industrial Development Division of the Scottish Economic Planning Department in Glasgow while, in addition, bodies such as the Scottish Development Agency (see page 36) and the Highland and Islands Development Board have been set up by government to stimulate further industrial and commercial growth.

Looking at the present economic picture of Scotland, it is clear that the country offers exceptional opportunities for investment. Scotland's main industrial area is in the central belt bounded by Dundee and Edinburgh on the east and Dumbarton and Irvine on the west. This area contains about four-fifths of Scotland's population of five million.

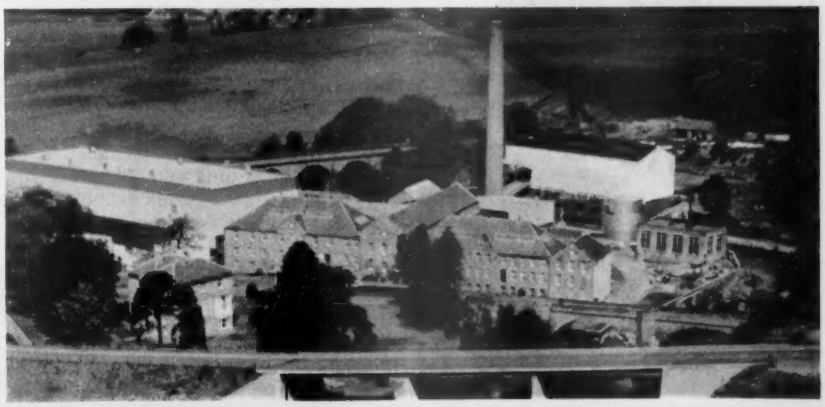
Since the early 1970's the development of North Sea oil and natural gas resources has had a major impact upon the Scottish economy. It is estimated that some 56 000-65 000 people are now wholly employed in Scotland directly or indirectly as a result of North Sea oil developments. These oil-related developments have taken place not only in Shetland, Orkney, the Moray Firth area, Aberdeen and other parts of North East Scotland, but also in west central Scotland, where the bulk of manufacturing industry is situated and where some traditional heavy engineering industries have been contracting as a result of changes in technology and demand.

These developments have supplemented the growth of new industrial activities which has been a continuing process over the past 30 years. Prominent among these have been petrochemicals based at Grangemouth – now one of the largest production centres in Europe; electronics and electrical industries in Fife, Strathclyde and Lothian; earthmoving equipment in Strathclyde; and motor manufacturing at Bathgate and Paisley. A major indication of the success of the new companies is that those setting up between 1945 and 1964 held their labour forces steady over the following decade, while that of older industries fell by about 100 000.

A substantial number of firms came from abroad, and companies based in the United States of America made a particularly important contribution. It is estimated that American industry employs over 90 000 people in over 120 companies in Scotland, including Polaroid, IBM, Burroughs, General Motors and, more recently, Digital Equipment (Scotland) Ltd.

Part of the new development has taken place in Scotland's new towns. More than 60 000 new jobs, some 40 000 of them in industry, have been provided in environments of outstanding quality in East

C. H. Dexter Ltd, a subsidiary of the Dexter Corporation of America, invested more than £4 million in bringing Chirnside Mill a closed down nineteenth-century paper mill in Berwickshire back to life. Over 200 people are now employed in the manufacture of special paper products.



Kilbride, Glenrothes, Livingston, Cumbernauld and Irvine. Their success in helping to rejuvenate the Scottish economy has been marked, and in addition their contribution to the stimulation of ideas about town form, layout and standard of urban environment has been recognised internationally.

Changes are also taking place in the long established industries. In the iron and steel industry rationalisation and modernisation continues, to meet the demands of the new industries in Scotland, including increasing production of specialist products. Scotland has a long shipbuilding tradition, and although the size of the industry has declined through rationalisation, shipbuilding will continue to have an important role to play.

No profile of the Scottish economy could be complete without mention of the whisky industry. In addition to being a leading earner of foreign exchange, the industry also provides work for about 24 000 people with another 10 000 employed in cooperage, packing and associated work. The rest of the food, drink and tobacco industries employ a further 75 000 people. Other important industries, giving some indication of the wide variety in Scotland, include the mechanical engineering sector, which employs over 90 000; clothing, 34 000; paper, printing and publishing, 50 000 and aircraft, 16 000. Scotland is also noted for high quality textiles, especially tweeds and knitwear; carpeting, where there has been extensive modernisation in both the woven and tufted sectors; smooth floor-covering in both linoleum and modern vinyls; and jute, where the industry has diversified into the extrusion and weaving of synthetic fibres.

One of the chief attractions for industrialists seeking to set up or expand in Scotland is the availability of both skilled and semi-skilled labour. Considerable emphasis is laid on providing training and retraining facilities so that workers can learn new skills or upgrade existing ones. Scottish workers have shown that they adapt well and quickly to new types of jobs, as instanced by the example of miners from the coalfields of Fife who now turn out first-class work in the factories of Glenrothes.

There are eight universities in Scotland which produce over 8000 new graduates per year, of whom about 3000 have degrees or diplomas in science and engineering. The Scottish Business School offers mainly post-graduate and post-experience courses. In addition there are 14 Central Institutions, unique to Scotland, which provide courses in vocational and aesthetic subjects. Some 60 education authority further education colleges and centres provide a range of full time and part-time courses related to modern industry and commerce. Management courses are also available.

Modern roadway networks have been created to provide fast free-flowing travel between urban centres in Scotland and to provide good road links between Scotland and England. First class port facilities exist on the east and west coasts to countries overseas and air services provide speedy travel between Scotland and England, the USA and Europe. Scottish rail services, including comprehensive container facilities complement the other transport links.

Scotland offers unsurpassed scope for leisure activities. As well as the traditionally famous sports – fishing, sailing and golf on world renowned courses – there are modern facilities for winter sports. Scotland has its own symphony orchestra, opera and ballet companies of international repute. The Edinburgh Festival is an annual event of world standing. The country's unique scenery, history and traditions draw millions of tourists every year.

A catalyst for industrial expansion

The Scottish Development Agency, formed two years ago with the twin objectives of refreshing economy and environment, works hand-in-hand with national and local government to offer a complete investment package for industrialists. It is based in Glasgow and has offices throughout Scotland, a country which has been one of the United Kingdom's fastest industrial growth points during the seventies.

The discovery of North Sea oil has been the principal cause of acceleration, particularly in the north east. Although oil has attracted the spotlight, elsewhere Scottish industry has been undergoing a revolution. The traditional economy based on coal and steel is being strengthened by modern, high technology industries supported by a skilled and adaptable labour force.

The agency has powers to invest in companies by providing loans, subscribing for share capital and giving guarantees. It can provide modern factories anywhere in Scotland to house new and expanding businesses.

The total Treasury-allocated budget for the first five years up to 1980 is £200 million which can be increased by government order to £300 million. Of the initial allocation, £120 million is available for investment in industry. Factory building is expected to absorb £100 million and the remainder will be absorbed by land renewal, the other major responsibility of the agency.

Since December 1975 over £17 million has been invested in 29 manufacturing companies whose interests ranged from knitwear, carpets and papermaking to advanced technology engineering, electronics and rough-terrain vehicle building.

The agency recently announced a loan of £3 million to Caledonian Airways to help to bring its aero-engine workshop, and over 200 jobs, to Prestwick in Ayrshire. More than £1 million has been allocated to Stonefield Vehicles Ltd, another Ayrshire company researching, developing and manufacturing a new range of heavy-duty four-wheel drive vehicles, and £2 million has helped British Carpets Ltd, part of the Guthrie Corporation, to undertake a major machinery and factory modernisation programme.

The single biggest commitment to industry was £8½ million to be spent over five years to help American diesel engine manufacturers, Cummins, to expand a factory at Shotts in Lanarkshire, a project costing a total of £30 million. The 1200 new jobs which will be created are a tribute to the agency's readiness to offer substantial finance immediately and to the quality of the existing workforce. The agency is building the new factory buildings, roads and services for the expansion.

The agency has taken major shareholdings in seven companies with investments totalling £8 million. Among these is a 100 per cent holding in Lothian Electric Machines Ltd of East Lothian, a company built on the pioneering efforts of American-based Ranco Incorporated and now employing over 700 making electric motors for household goods.

A £1.5 million investment has given the agency a substantial holding in Henry Ballantyne and Sons Ltd, employing 1100 in the Borders and Ayrshire making woollen and worsted cloth and £450,000 constitutes a 90 per cent holding in Inveresk Research International Ltd which is engaged in some of the world's foremost contract research in chemicals and pharmaceuticals.

The agency aims to increase the size and scope of viable companies which have a promising future, but which may not easily attract private investment. There is no limit to the amount of equity the agency can take in a business and it has the power to establish new enterprises alone, or in partnership. If more than £2 million or a stake of 30 per cent is involved, the Secretary of State for Scotland's approval is required. The agency expects an adequate return on its investments but because of its wider development role, may be prepared to wait longer than a commercial investor normally would. It may also be prepared to sell back an investment to the original promoters in appropriate cases.

Any investment is by agreement and

THE 105-ACRE ENCORE FOR INDUSTRY IN EDINBURGH.

The Lothian Region of Scotland, with Edinburgh at its heart, is a great place to do business. Ask the companies who have taken sites on Edinburgh's Industrial Park at South Gyle. There are now only 22 acres left of the original 92.

And to meet the demand, an additional 27 acres is being made available next year, with a further 78 acres after that.

A 105-acre encore is a powerful indication of what Lothian can offer to industry.

Or ask any of the 147 thriving companies, with nearly 11,000 employees, who are already established on industrial estates owned by the Regional Council throughout Lothian. There will be more companies setting up business on these estates this year. If you think you may have a place among them, consider the reasons for this success story:

First, Lothian has 22 fully-serviced industrial sites available right now; 665 acres ready for your factory immediately.

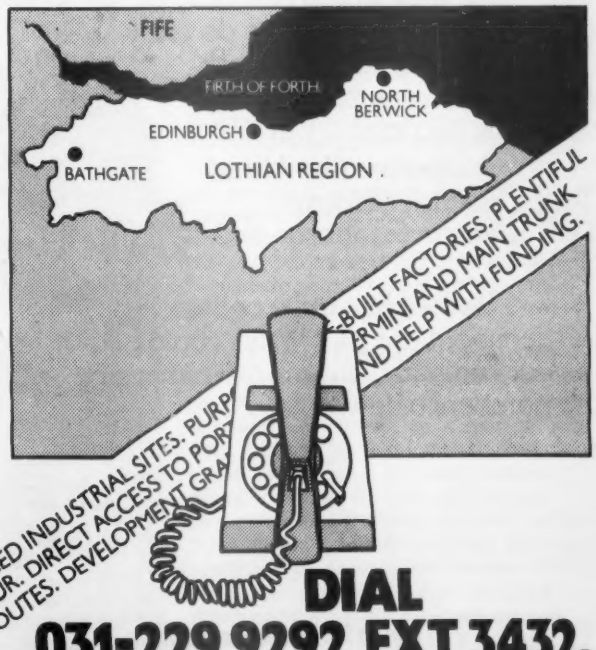
Second, Lothian labour is diligent, dependable, easy to recruit and to train. It has won international recognition.

Third, Lothian is one of Europe's foremost funding and investment centres. There is no better place for commercial money. And, of course, Lothian is a full Development Area with all the grants and benefits that go with Development Status.

Lothian offers you an unrivalled choice of sites. Five minutes from the docks. Ten minutes from the High Street. Right on the national motorway network. Thirty miles out into rural East Lothian. There just has to be something that suits you.

Sites and facilities apart, we have a long record of successful industrial development. Our professional experience is ready to work for you.

Fly up and see us, and we'll tell you more. But first, contact:–



R. I. Shanks,
Industrial Development Manager,
Lothian Region Development Authority,
18 St. Giles Street, Edinburgh EH1 1PT.
Telephone: 031-229 9292 Ext 3432.

DIAL
031-229 9292 EXT 3432.

DEVELOP WITH THE LOTHIAN REGION

Could what convinced Ford, Thyssen and Alfa-Laval convince you?

All three companies are convinced they made the right choice when they came to Wales.

But why did they come? What did they see in Wales?

First, they saw strong communications links with major markets in the UK, Europe and the rest of the world.

They saw a reserve of skilled labour and a good record of labour relations.

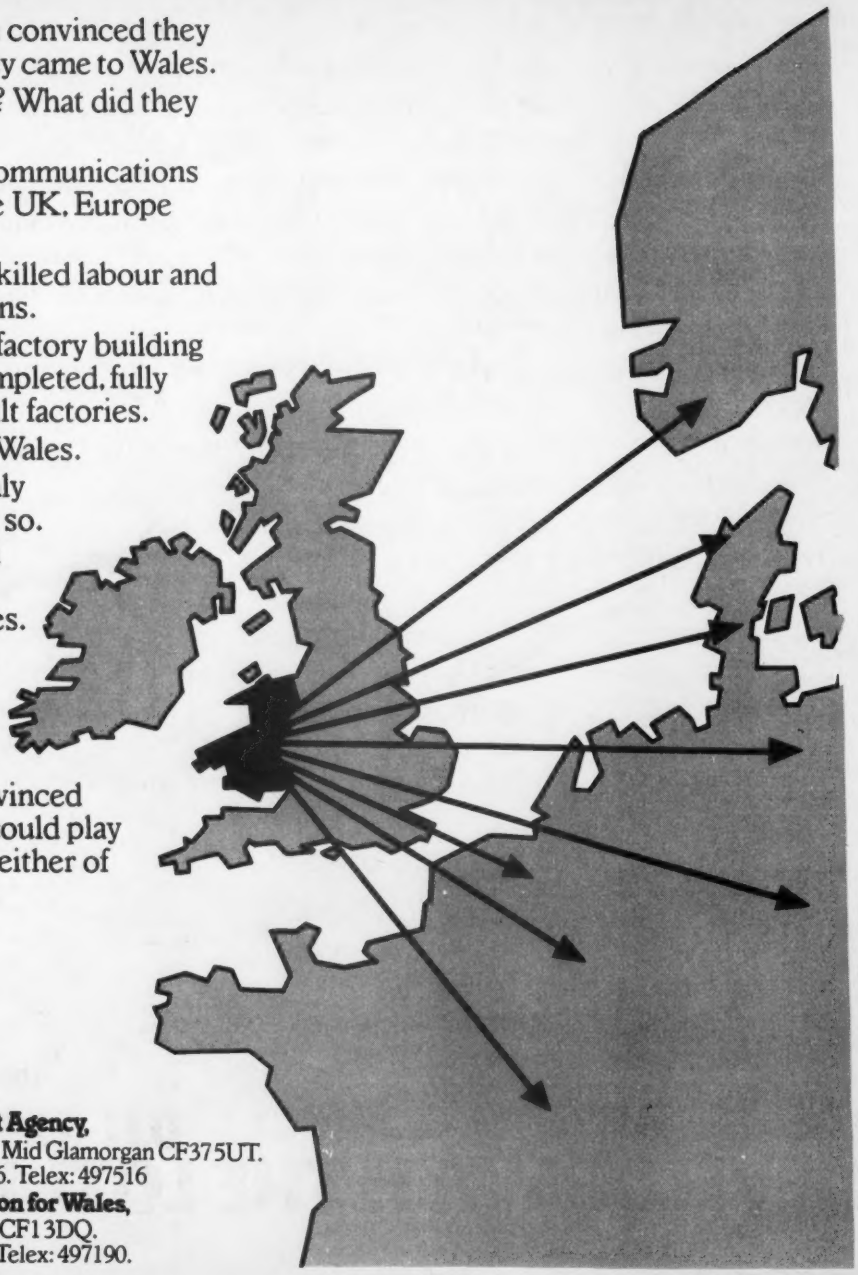
They saw an extensive factory building programme that embraced completed, fully serviced units and custom-built factories.

That's why they chose Wales.

But they weren't the only international companies to do so. Over 150 European, American and Japanese companies are operating successfully in Wales.

Companies like Alfred Teves, Staedtler, Hoover, ITT, Johnson & Johnson and Sony.

If you'd like to be convinced further about the part Wales could play in your company's future, call either of the numbers below.



Welsh Development Agency,
Treforest Industrial Estate, Pontypridd, Mid Glamorgan CF37 5UT.
Tel: Treforest (044 385) 2666. Telex: 497516

Development Corporation for Wales,
15 Park Place, Cardiff, CF1 3DQ.
Tel: Cardiff (0222) 21208. Telex: 497190.

co-operation because the agency has no powers of compulsory investment or acquisition. In discussion with client companies, their bankers and professional advisors, the agency has evolved a very wide range of investment support, suiting the package to the case. In some instances this has included loans of varying terms, ordinary share capital, convertible securities, or provision for the other partners to buy back agency held equity.

The agency will soon move from its present largely reactive phase into a more strongly innovative one. It will survey Scottish regions, drawing fully on existing studies and material, and will evolve proposals for strengthening industry. These may be implemented by seeking out relevant and potentially interested companies and putting developed proposals before them with offers of financial or factory support, or accelerate their own re-equipment or product development programmes, or through greenfield ventures, created from scratch by the agency, on the basis of carefully chosen management.

The agency is adequately equipped to backup its investment incentive as Scotland's largest landlord, managing 169 estates with over 600 factories totalling some 2.3 million m² of floor space. More than 250 foreign-based companies are established in Scotland, employing over 100 000 people. One in seven of the Scottish workforce is employed by North American owned companies which occupy over 1.4 million square metres of SDA factory floor space.

The agency, which is currently building 17 new advance factories ranging from 140 to 12 500 m², has 160 000 m² of factory floor space available for immediate use, ranging in size from 140 to 12 600 m². The agency can provide rent-free periods, normally up to two years. In special development areas rent-free periods up to five years can be available for significant new manufacturing projects.

Mortgages, long-premium leases, normally 99 years, purchase or leaseback arrangements and other forms of factory finance can also be considered. The agency also builds bespoke factories and is engaged in a £12 million programme extending or building factories to order, with a further £5 million of work already planned on next year's budget.

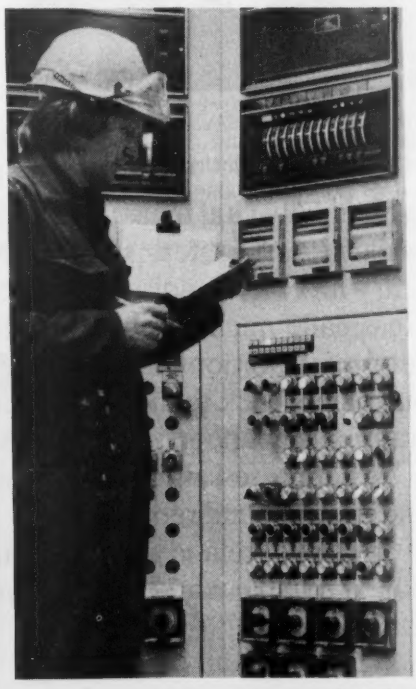
Wales

Building a multi-industry economy

In the space of just 40 years Wales has shaken free from excessive dependence upon coal and steel and is building up a multi-industry economy in which science-based trades and advanced technology are well to the fore. Overseas investment is playing a major role in transforming Wales into a modern industrial nation.

Wales is now the home of more than 4000 manufacturing units producing a wide diversity of goods, and overseas firms are among the leaders of its growing manufacturing sector. From only four overseas companies in 1945, the total in Wales had grown to 43 by the end of 1964 and now stands at about 130. Many of the overseas companies which are now choosing Wales for expansion are being helped by the Welsh Development Agency.

The agency was set up two years ago with the task of helping to regenerate the economy in Wales. It builds and lets advance factories and constructs industrial premises to manufacturers' individual specifications. The agency also supplies investment capital, either through equity stakes or loans, or a combination of the two, to assist industrial expansion.



The European manufacturing nerve centre of Monsanto, the American chemical group, is this control room at the group's Ruabon plant in North Wales. The plant produces 40 000 tonnes of specialised industrial chemicals every year.

In addition the WDA plays a major part in co-ordinating efforts to attract industry to Wales, so the agency not only offers its services and expertise in its own fields of industrial property and capital investment but also supports the Welsh Office in providing advice on the whole range of government incentives to industry. The availability of financial inducements, a ready supply of adaptable labour, suitable sites and well-designed industrial premises and good communications are all reasons cited to the agency by overseas companies for choosing Wales for expansion.

The whole of Wales is an assisted area, in that all parts of the country qualify for some of the aid or incentives provided by the government in the form of regional development grants, selective financial assistance or rent-free periods in WDA factories. Special development areas exist in the industrialised south, in a belt around the valley communities of Gwent, mid Glamorgan and West Glamorgan, and in the rural north-west around the Lleyn peninsula of Gwynedd and the island of Anglesey. The rest of Wales is a development area, except for parts around Newport and eastern Gwent and in the northern coastal belt of Clwyd.

The choice of Wales by the Ford Motor Company as the location for a £180 million car engine plant was an investment decision which, in microcosm, shows the advantages which Wales has to offer to expanding industry. The multi-million pound industrial complex, the largest single investment in manufacturing industry in the United Kingdom since 1945, is being built by Ford on land on the WDA's Waterton industrial estate at Bridgend. When completed, the plant will employ 2500 people and will provide a considerable number of jobs in spin-off employment among supplier firms.

One of the reasons why Waterton was selected by Ford, amid intense competition from Holland, Belgium, France, Spain, West Germany and Eire, was because the

"We're staying in Northern Ireland to build on success."

Mr. Reg Hansen, Managing Director.
Goblin (N.I.) Ltd., Castlereagh Road, Belfast, Northern Ireland.
Subsidiary of B.S.R. Birmingham, England.

"Our latest expansion adds 35,000 square feet to increase our capacity still further."

"Our main product line is 'Teasmade', an electrical teamaker that wakes you automatically in the morning with a nice pot of hot tea. Reliable product performance is especially vital to us because the slightest problem with our untraditional 'Teasmade' might easily send our tradition-minded customers back to their traditional teapots.

"What possesses us to stay and even expand repeatedly in Northern Ireland are skilled reliable workers, reasonable unions, high productivity, low unit cost, compelling government financial incentives and liberal tax laws. All this combined has yielded us a highly acceptable profit since 1957.

"Here are some of the facts and figures from my own 10 years' experience as a Works

Manager in Northern Ireland.

Production and Worker Reliability

"In 1976 our workforce of 366 people (shop floor and office) produced 335,000 Teasmades—retailing in the UK from £16.50 to £50, (in the U.S. from *$31.68 to $96.00), 160,000 fractional horse-power motors and 112,500 vacuum cleaners. The number of Teasmades alone represents a production increase of 400% since 1972, and we have just added 35,000 square feet to increase our production to 500,000 Teasmades per annum.

Union Attitudes

"None of the three unions representing our workforce has ever opposed our installing more modern machinery to help achieve better productivity, and all have indicated a willingness to accept more sophisticated equipment as it becomes available.

Productivity

"We increased our productivity per person in 1975/76 by 58.76%, and again in 1976/77 by 38.39%. Some would say that our modern machinery was responsible, but having noticed that workers use machinery as they see fit I award the credit to our workforce.

Strikes, Absenteeism, Lateness

"We have had no labor stoppages since 1973; disputes, yes, but I have had more arguments with my wife than with either workers or unions. Absenteeism averaged 4.5% last year, 5.1% this year, and hours lost through lateness are too few to measure.

Peace on the Shop Floor

"Sporadic violence in Northern Ireland is not exactly a secret, but on plant premises-shop floor and clubhouse-peace reigns. If there is any dissension it's about football.

Northern Ireland Needs More Jobs

"I hope this helps to answer the question of why we stay and expand here in Northern Ireland. If you would like to know more about my 10 years' experience running a factory in Northern Ireland, write to me at the address below my picture and I'll answer whatever questions I can.

"Or for more complete information, please fill in and mail the coupon below."

NORTHERN IRELAND

it will pay you to take a longer look

*Rate of exchange £1=US$1.92.

Mr. R. I. Simpson, Department of Commerce for Northern Ireland, Ulster Office, 11 Berkeley Street, London W1X 6BU.
Telephone: London 493 0601. Telex: 21839.

Please send me complete information on Northern Ireland or my copy of "Ask any businessman who's already here"—a selection of testimonial case histories from some of the successful international companies now operating in Northern Ireland.

Name_____

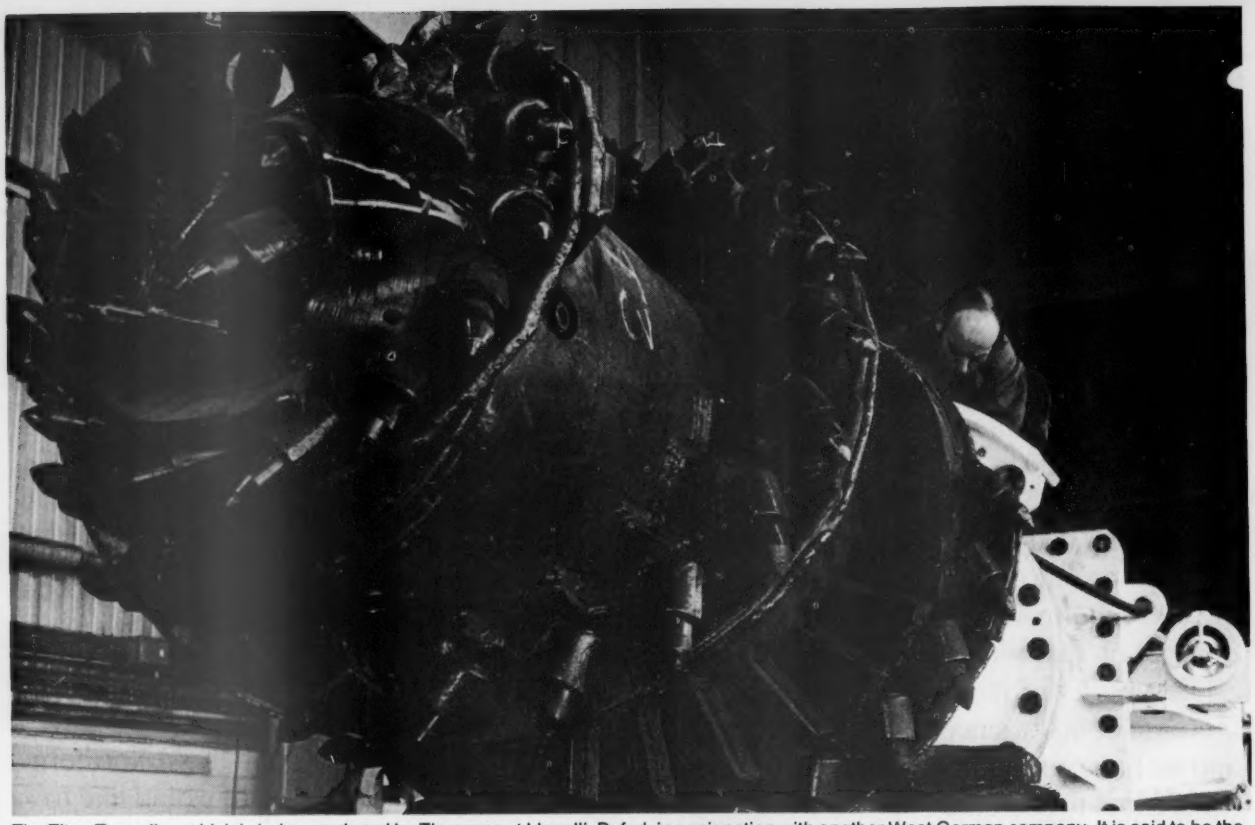
Position_____

Company_____

Address_____

_____ Telephone_____

TI 3/78



The Titan Tunneller, which is being produced by Thyssens at Llanelli, Dyfed, in conjunction with another West German company. It is said to be the last word in fast, heavy-duty tunnelling for mines and metro, hydro-electric and road schemes.

WDA was able to offer a suitable site ready for immediate development. The existence of good communications was another important influence and Ford itself said it had been impressed by the stable industrial relations which the company had been enjoying at its other plants in Wales.

The agency has a land bank of about 280 hectares and is negotiating to buy a further 225 hectares of land, so sites in all parts of Wales can be offered to industrialists. Wales is the assisted area nearest to London and the South East, which in itself is proving to be a telling reason why overseas companies with need of speedy access to these important markets are choosing Wales as a base. The nearing completion of the M4 motorway, from the Thames to the Teify, and with its spur links to the Midlands and the North is bringing these centres still closer to the heartland of industrial South Wales, while access into North Wales from the Midlands and the North is being strengthened by a major road construction programme.

Ford's experience of good industrial relations is borne out by others. About 85 per cent of all overseas-owned companies in Wales classed industrial relations over the past 10 years in a range varying from excellent to satisfactory, according to a survey carried out by Professor Glyn Davies and Dr Ian Thomas, co-authors of a report, 'Overseas investment in Wales'.

There were other compelling considerations for Ford, not least the availability of a young workforce with a high ratio of skilled workers, the presence of universities and technical colleges of high academic repute, and easy access to ports. Ford decided to undertake construction work itself, although the agency is equipped with all the skills to have done the job, as it is doing for Hoover with a new 37 000 square metres manufacturing complex at Merthyr Tydfil, which will provide jobs for about 3000 people.

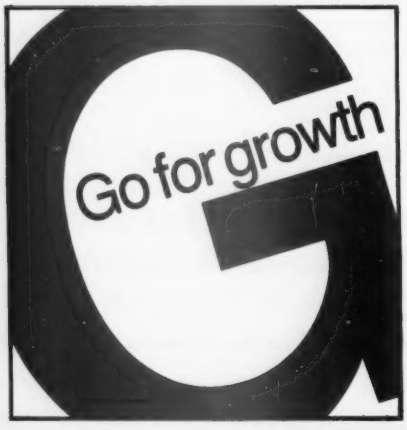
The agency also has a wide range of factory units ranging from 140 m² to 5000 m² ready for immediate occupation, and it is planning to add to its stock of advance factory units at a rate of two a week over the next 18 months to two years. The WDA, as the biggest industrial landlord in Wales, is responsible for 1.4 million square metres of factory space and about 200 000 square metres is either available for letting, under construction or about to be started.

Besides Waterton and the adjoining Bridgend industrial estate, the WDA has major estates at Treforest, Hirwaun and Wrexham and is opening up substantial new industrial sites at Shotton, on Deeside, and at Rassau, near Ebbw Vale.

Overseas industrialists have been quick to recognise the attractions for expansion which Wales has to offer, and so have contributed to one of the main industrial success stories of the UK of the past 30 years. Overseas investment in Wales, including the big Ford expansion, is now reckoned to be worth about £750 million, and foreign-owned firms account for about 16 per cent of total manufacturing employment in Wales.

Four out of seven Japanese offshoots in the UK, among them electronics giants Sony and National Panasonic, are based in Wales. West Germany is another major investor. Thyssens, the West German mining and civil engineering group, arrived in Wales in 1954 to sink the shafts for a new coal mine at Cynheidre in Dyfed. The company stayed to become the largest mining contractor in the UK and, with UK headquarters at Llanelli, they have since branched out considerably into building and civil engineering.

But it is the United States, with some £600 million worth of investment, which is Wales's biggest single overseas investor. The earliest of all overseas companies to make a major investment in Wales was Monsanto Chemicals, which established itself at Ruabon in 1920. This is now Monsanto's main European manufacturing centre. Each year about 40 000 tonnes of chemical products are produced at the Ruabon plant and about half is exported.



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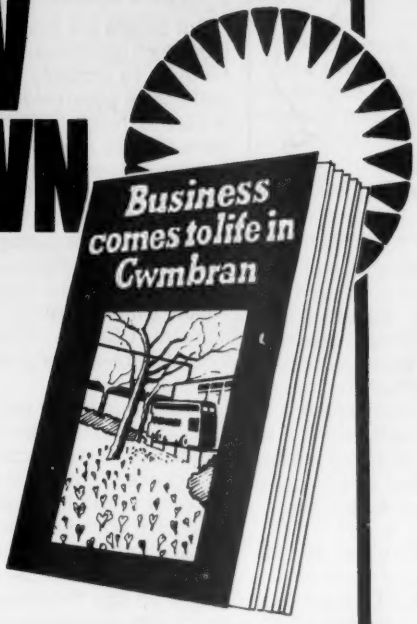
CWMBRAN NEW TOWN



Cwmbran Development Corporation has solved most of the problems encountered by industry during and after relocation. Already more than 170 companies have settled here.

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To R. W. Howlett, General Manager,
Cwmbran Development Corporation, Gwent House, Town Centre, Cwmbran, Gwent NP4 3XJ, Wales. Telephone Cwmbran 67777.

Name_____

Position_____

Company_____

Address_____

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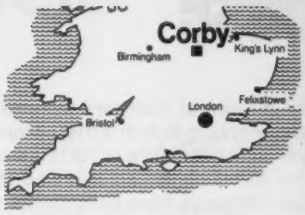

If you're looking for a place to re-locate or expand your business, the New Town of Corby has got so much going for you.

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Many companies have already put down roots in Corby – with success. Why not join them? Our experienced help and advice is at your service.

Corby

For a fully detailed brochure on Corby, contact K. R. C. Jenkin, B.A., F.R.I.C.S., Chief Estates Officer, Corby Development Corporation, 9 Queen's Square, Corby, Northants NN17 1PA. Telephone (053 66) 3535.

Northern Ireland

A stable industrial base

The people of Northern Ireland have been working in industrial communities ever since the birth of its linen industry over three centuries ago and for more than 100 years have been building ships which have become household names around the world. The top economic priority of government in Northern Ireland is the creation of new jobs. More than 300 companies have been attracted to the province since 1945, from Great Britain and from further afield, including 30 American companies which represent $696 million worth of investment at present values and which currently employ 18 000 workers.

Government in Northern Ireland has been well educated in the requirements of industry; indeed, the working links between government and industry are probably as close in Northern Ireland as anywhere else in the world. Of course government does not force its attentions on industry. But it is attentive to industry's needs. The lines of communication to senior government personnel are short and there is an absence of red tape.

Political stability is of course closely tied in with security of investment. Northern Ireland has a political problem but this problem does not impair security of investment. Throughout the entire course of the troubles the province has lost a total of 824 jobs through companies closing as a direct result of terrorist action. None of those companies were foreign owned. To put this figure into perspective, it should be noted that during the same period over 45 000 new jobs were promoted in Northern Ireland.

A handful of other companies, now successfully back in business, have suffered

from the troubles over the course of the years. But they have been put back into business by government. Legislation in Northern Ireland not only compensates for immediate loss resulting from physical damage but also for consequential loss of business profits. Where employment is to be reinstated this compensation extends to inflation-proof replacement of fixed assets.

Northern Ireland is part of an island on the edge of Europe. However, the communications infrastructure is well developed and efficient and access to EEC markets is easy. In a 2½ year study into alternative locations in the EEC undertaken by Synthetic Industries of Missouri, which last year announced an $8.7 million investment in the province, it was said, 'we found that Northern Ireland is convenient to the rest of the common market because of the excellent transport facilities that exist there. Door to door container shipments between plants in Northern Ireland and all parts of Europe are commonplace, efficient and economised.'

In addition to some of the biggest ships in the world Northern Ireland designs and builds aircraft and missile systems which are used by national armed forces around the world. One of these newly developed aircraft, the Shorts SD 3-30 wide bodied commuter airliner, is being introduced in some numbers in the USA, Canada and Germany.

Over the years of the troubles – since 1969 – manufacturing output in Northern Ireland has risen by 14 per cent as opposed to the UK figure of 4 per cent. Productivity increased during the same period by 37 per cent: the UK statistic was 30 per cent. Exports from Northern Ireland have risen by 104.5 per cent since 1969. Northern Ireland's grim unemployment statistic of currently 12.6 per cent projects a waste in terms of human resources of 67 219 men and women and the situation is exacerbated by a rate of 17 live births per 1000 of the population, one of the highest in Europe.

But people are being prepared for the jobs which government is seeking to create for them by probably the most comprehensive government training machine in Europe. Nowhere in Northern Ireland is more than 25 miles from a government training centre.

Only 4.1 per cent of all workers in Northern Ireland were engaged in any type of industrial dispute during the five years 1972-76 and this figure dropped to 2.5 per cent in 1976. Since 1969, Northern Ireland's track record has been better than that of the USA, the UK and the Republic of Ireland and only marginally worse than that of Japan.

Northern Ireland's total energy generating capacity is currently being increased by 66 per cent. This is a location factor of some importance. Steps have been taken which will ensure that the cost of this massive expansion does not result in higher charges for present industrial consumers.

Grants towards expenditure in Northern Ireland on new buildings, machinery and equipment are significantly higher than anywhere else in the UK. Assistance, which can itself be substantial, is also available towards start up costs and manufacturers in Northern Ireland receive a weekly wages subsidy. Where investment in new machinery is concerned, depreciation combined with the top rate of grant can mean that in certain circumstances the government contributes up to 99.4 per cent of costs.

Northern Ireland is a beautiful country, with tremendous natural amenities for sport and leisure. Immigrant managers and key-workers may at first be somewhat anxious about travelling to the province. Later on, they are generally very unwilling to leave when they have fulfilled their contracts. This latter aspect is one for their respective

New jobs promoted and jobs lost to manufacturing industry due to terrorist action

	1969	1970	1971	1972	1973	1974	1975	1976	Jan-June 1977	Total
New jobs promoted by the Department of Commerce for Northern Ireland	5 943	6 484	7 265	6 864	5 182	4 806	3 075	2 251	3 254	45 124
Jobs lost through firms closing as a direct result of violence	3	nil	638	183	nil	nil	nil	nil	nil	824

Number of working days lost per 1000 workers

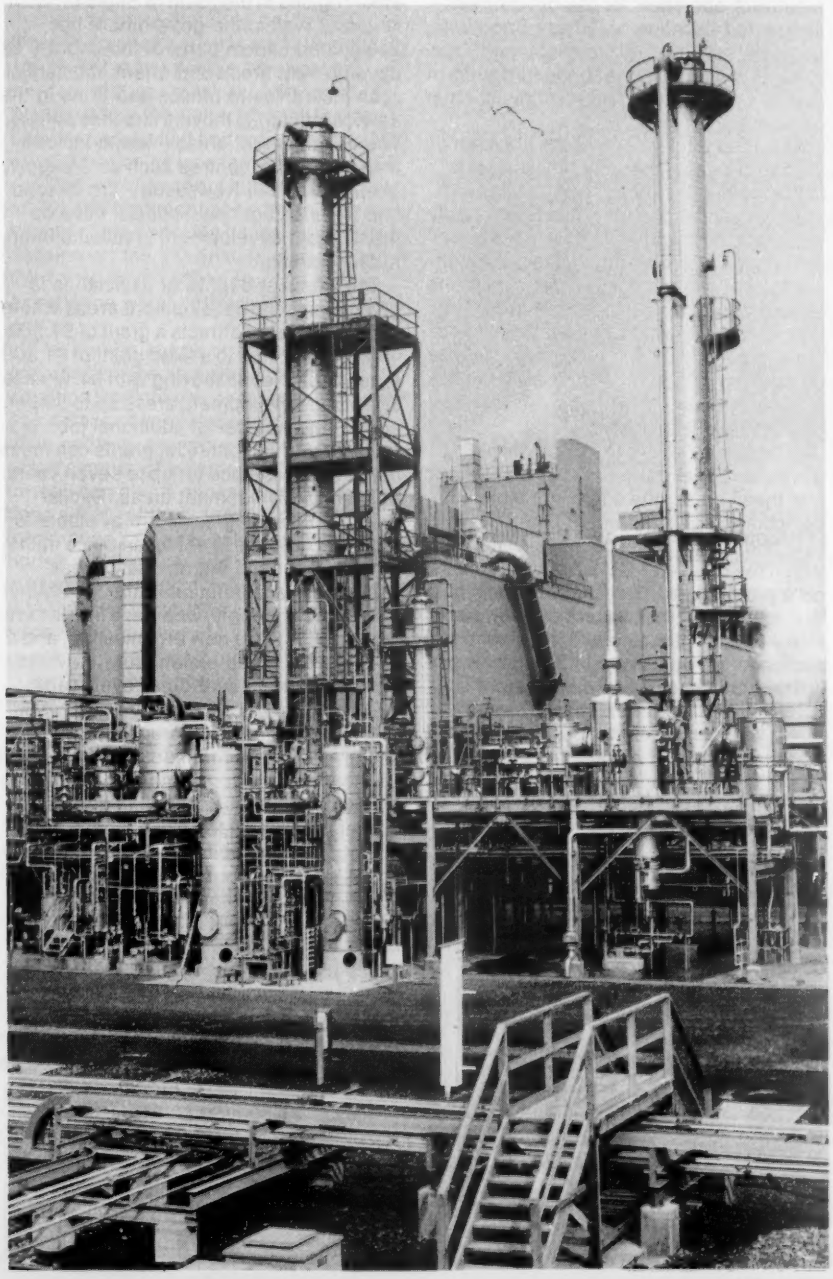
Country	1969	1970	1971	1972	1973	1974	1975	1976	Yearly average
Northern Ireland	276	244	481	654	154	545	498	91	368
United Kingdom	297	480	613	1 082	318	650	261	145	481
USA	700	941	674	372	357	585	381	463	559
France	200	180	440	300	330	250	390	368	307
Italy	4 160	1 730	1 060	1 670	2 480	1 800	1 640	1 590	2 016
Republic of Ireland	1 285	1 405	376	286	282	753	279	n.a.	666
Japan	200	200	310	270	210	450	400	n.a.	291

companies to deal with. The first is one for government. For too long the facts about living and working in Northern Ireland have been overshadowed by its violent image, to an extent where the province is being written off as an investment location at the earliest planning stage on a basis of second-hand knowledge and without regard for its many positive factors.

This is despite the fact that the professionals whose business depends on risk evaluation, such as the insurance companies, rate the risk to the individual no higher in Northern Ireland than in any major city in Great Britain or on the continental mainland. The fact is that the mortality rate from the troubles in Northern Ireland averages out at 14 per 100 000 of the population per year compared with the Province's fatal road accident rate which in 1976 was 21.5 per 100 000.

The companies already established in the province have made up their own minds quite firmly, instead of letting the media do the job for them. Last year manufacturing investment from public and private sources totalled $297.5 million exclusive of future investment commitments amounting to a further $116.5 million, nearly one-third of it by foreign-owned companies. Northern Ireland has proved that it can accommodate a wide range of new investment. Companies which have gone there have found an environment conducive to commercial success and have quickly felt themselves at home amongst warm-hearted people – glad to see them come and anxious to help them to make good.

Part of Du Pont (UK) Ltd's Maydown complex in Londonderry where the company is to spend £29 million on reconstructing and modernising its neoprene synthetic rubber manufacturing operation. It is expected to provide up to 1000 jobs in the construction industry over a two year period.



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Advice on locating offices

People earning a living in offices account for over a quarter of the working population in Britain. Where such a large percentage of the workforce is situated, how they get to work, what sort of living accommodation they require, is of obvious importance in terms of labour distribution, regional development and future planning on a national scale. Mardie Esterkin explains how the Location of Offices Bureau can help.

The growing importance of the office sector in expansion and investment plans last year prompted the Secretary of State for the Environment to consider a much wider theatre of operation for the government sponsored Location of Offices Bureau, originally set up in 1963 to encourage firms to decentralise from the congested areas of central London to suitable centres in other parts of the country.

As a result, the scope of the Location of Offices Bureau – the only official information and advisory agency dealing with office location in the UK – has been greatly extended. A new brief to 'promote a better distribution of office employment throughout the UK' means that the services of the bureau are no longer confined to central London businessmen but are available to firms in every part of the country who may be seeking advice on relocating an office. At the same time, LOB has been asked to help in the fight against inner city decay and deprivation by trying to attract office development and thus office employment into these areas, the subject of much official concern at the present time.

In addition to wider responsibilities within the country, LOB is about to embark on a promotional campaign overseas as a first step in another aspect of its wider role – that of attracting overseas companies to set up offices in Britain.

The mobility of office employment is a concept that the Bureau has always fostered. Many more firms today are aware that the location of an office is a factor that needs to be kept under constant review. Is the firm paying too much in rents and rates? Could it – or one of its departments – operate just as efficiently elsewhere? These are questions that should be regularly asked. It is now even the practice in many firms to hold a regular 'location audit' in the same way as they would review other factors when assessing efficiency and profitability.

In spite of comparative increased mobility, however, the bulk of offices remain stubbornly in the south-east of England, although there has recently been some drift westwards to centres such as Basingstoke, Swindon and Bristol and some movement northwards.

In an effort to encourage firms to consider regions in the north of England, Scotland and Wales, the government has designated certain parts of the country as development areas and offers substantial cash incentives to offices and firms in the service industries moving into these areas. The development areas – which include major industrial centres such as Glasgow, Manchester and Newcastle – are divided into three categories – special development areas, development areas and intermediate areas.

The greatest degree of assistance is given in special development areas where each job created attracts a grant of £1,500. This is in addition to a fixed grant of £1,500 for each employee moving with his work to any of the development areas up to 50 per cent of the number of additional jobs created. Generous rent relief grants can mean a rent free existence for up to seven years in special development areas. Similar grants on a sliding scale are available to firms who choose to set up an office in the development and intermediate areas.

A major consideration in the location of an office is economy, whether a firm is moving or setting up a new organisation, and a large part of office expenditure inevitably consists of rents and other overheads.

Taking the United Kingdom as a whole, there are immense differences in rents asked for office accommodation. In the central London area, for example, rents can be as much as 10 times those in some provincial centres. All the signs, after a period of stability, now point to a renewed rent spiral in the centre of London. Total overheads will become even heavier with the increased burden of rates which have rocketed 160 per cent in the City and about 130 per cent in the West End during the past five years. But even in London itself, significant differences can be found between the City area and some of the inner boroughs and suburban areas where office space can often be had for about half the rental of those in the central areas. In the provinces, for many reasons, rents can vary considerably from town to town.

Many firms feel they need to be in a particular area for the sake of proximity to facilities necessary to their business. Traditionally, organisations linked with banking,

stockbroking, the commodity markets, advertising and so on have considered it essential to be in central London. Firms from abroad have also, in the main, settled, at least at first, close to the centre of London and the bulk of them will probably continue to do so.

Some, however, have solved a part of the problem by a partial relocation to cheaper areas of departments whose work does not demand proximity to any particular area. The successful move of some 1500 jobs to Sheffield by the Midland Bank is one example. The Mercantile and General Reinsurance Company's move last year providing about 500 jobs in the future for Cheltenham, is another. One foreign bank, the Punjab and Dindh Bank, setting up their first office in the UK last year, chose to ignore the City and establish itself in Southall, a district of London with a high percentage of settlers from the Indian continent.

For most organisations, moving or setting up an office tends to be an operation that only happens once in many years. As a result, not many people can become experts with personal experience of the problems and the welter of detail that has to be sifted, assessed and acted upon before even a choice of location can be settled.

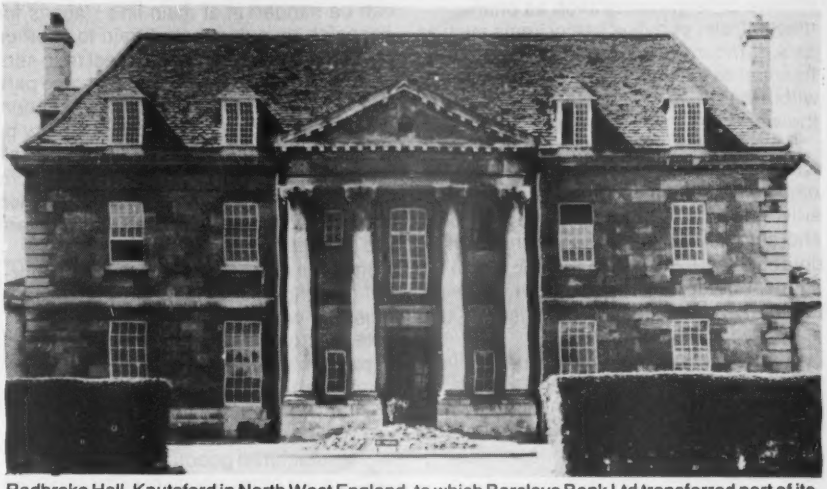
A firm which is about to consider a move or the establishment of an office, can save endless time and considerable expense by drawing on the information available from the Location of Offices Bureau and the experience which it has built up over the years.

The bureau keeps a register of office accommodation and sites under construction available all over the country and has details of rents being asked in all the main centres. Having established the requirements of a particular firm, the bureau can give a choice of possible locations which might fit the bill, together with information on essential factors such as housing availability and prices, communications, educational and social facilities and facts affecting recruitment such as the number of school leavers likely to come on to the labour market.

For overseas firms considering setting up an office in Britain, the provision of such information under one roof is especially helpful. In addition to advice on suitable geographical locations, the bureau can advise on factors such as legal requirements for establishing a firm in Britain. It can explain technicalities which may not be familiar such as the system of local taxation in the form of rates, customary practice in leasing, the necessity or otherwise for planning permissions.

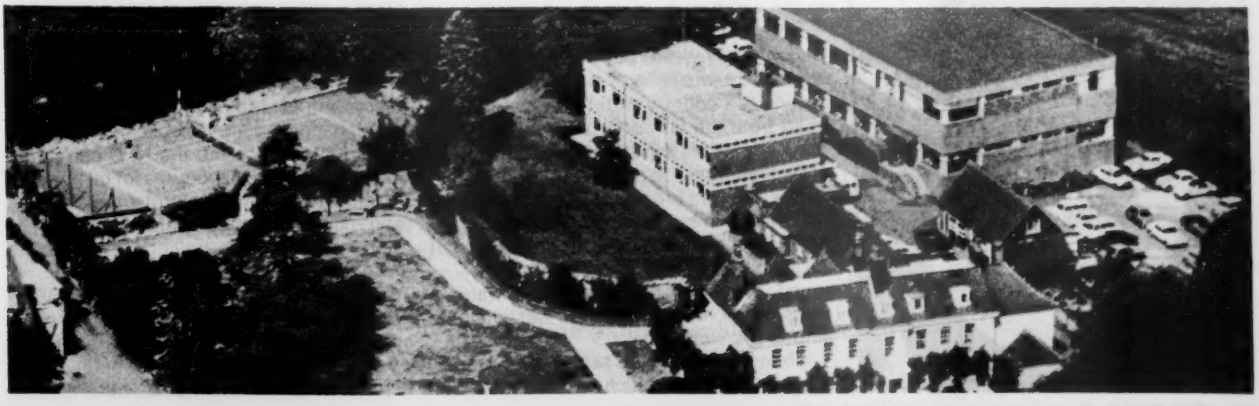
Overseas firms can use the bureau as a starting point from which they will be guided towards specialist sources when necessary and the bureau can often arrange for visits to firms already established for several years in an area who are willing to pass on to others their first hand experience.

Pioneer Mutual Insurance Co Ltd established its new headquarters in Liverpool in 1974.



Radbroke Hall, Knutsford in North West England, to which Barclays Bank Ltd transferred part of its head office operation and 1500 jobs. A modern office block has been sited adjacent to the hall and the grounds contain exceptional recreational facilities.

Tennis courts for the staff were one of the benefits of civil engineers, J. D. and D. M. Watson's move to High Wycombe in 1971: 130 jobs were taken to the new location.



Keeping in touch

John Bentley looks at transport and communications in Britain and between Britain and the rest of the world.

It is possible on paper to assess the relative advantages and disadvantages of the various development areas in the UK in financial terms but once the decision in principle to invest in Britain has been made one of the first considerations which the potential investor must take into account is transport costs.

And it is not just a simple matter of the cost of distributing the finished goods. Parts made in one country may have to be transported to Britain for finishing or final assembly; or raw materials might have to be shipped in from the other side of the world. The goods could be high value, low volume consignments such as pharmaceuticals; or bulky, heavy items such as cars, furniture or machinery. The distribution of finished goods could be totally within the UK, the EEC or to various parts of the world.

Each company has its own requirements, and there are no formulae for an ideal all-embracing solution to them all. What this article does is to point up those transport and communications links which are of potential interest to the investor and to suggest other considerations which need to be taken into account in addition to the basics.

Right at the beginning it is worthwhile covering briefly those communications services which we in Britain take for granted. The telephone service throughout the UK is second to none, with virtually nationwide direct dialling which is automatic and reliable. It is also possible from London and major cities to dial direct to subscribers to more than 32 major industrial nations of the world and there is a variable rate charging system which makes calls at certain times of day and at weekends considerably cheaper than at the morning peak hours. Similarly the telex system is nationwide, international and readily available, as are facsimile transmission systems, which will operate either on private lines or via the public network.

Britain's Post Office also operates specialised services such as Datapost and datel services both nationally and internationally. Lastly, of course the Post Office also runs the mail service, which is in two tiers – first and second class post. First class mail, if posted in the UK before 17.00 is virtually guaranteed to reach any other part of the UK on the following day.

Parcels may be sent by mail of course, but there is a variety of other methods of parcel distribution which are widely used. British Rail, for example operate a 'Red Star' service by which anything from letters and packets up to bulky and heavy items can be handed in at main line stations for despatch on a nominated train to another station, provided there is a direct train service between the two. Thus an engine part handed in at Kings Cross Station, London at 0930 could be in a Newcastle factory by 1400 on the same day at a relatively small cost. Road deliveries are carried out both by the ordinary British Rail parcels service and by a variety of specialised road hauliers and security companies.

These are of course internal, fairly normal carrying operations, but nevertheless important when, for example your projected factory in Cumbria will be using machinery or supplies which originate in Birmingham. You will already have made arrangements for the shipping and transport of your raw materials to the factory and the manufactured goods out of the factory, but there are other, ancillary considerations to be taken into account. 'For want of a nail, . . . the rider is lost,' as the saying goes.

International links

Precisely because the UK is a collection of islands, air and sea links with the rest of the world are prolific. Sea traffic, developed over centuries because of Britain's international trading position, was given further impetus by the industrial revolution and until the advent of the transport aircraft as a serious competitor after the last war was the only means of receiving raw materials of all kinds and distributing finished products to the world.

Recent developments in containerisation, and roll-on/roll-off freighting, have led to the revitalising of many smaller ports around the country with the result that, apart from the far north of Scotland, nowhere in the British Isles is more than 100 miles from the nearest port. Certainly, all the assisted areas are well within a 60-mile range of a port, and SDAs such as South Wales, Merseyside, the north-east of England and south-west Scotland surround, or are close to, major deepwater ports which have services to destinations across the world.

When it comes to the selection of a suitable location for a business, the investor will need to investigate each of the ports in some detail, as each tends to specialise in certain kinds of traffic; specific ports are used by specific operators on specific routes, so that it is relatively easy to tie up requirements for sea transport with available facilities.

The nearest port might not be most cost-effective, and careful study of a range of ports which can be used in conjunction with UK inland rail and road links will clearly establish the optimum combination of factory location and ports. Mainland Britain is bisected in its northern half by the Pennine hills and both the motorway network and the railway system tend to follow either the west or east coast route, with links across the country in the south, midlands and north.

In 1976 about 67 per cent of freight, in terms of tonne-kilometres, travelled by road, 16 per cent by rail, 14 per cent by coastal shipping and 3 per cent by pipeline and inland waterway.

In mid-1976 the UK had about 221 606 miles of public highway. There were 10 098 miles of trunk roads, of which 1428 miles were motorways.

The design of vehicles, their use on the roads and the maintenance of their mechanical condition are controlled by regulations which are kept under constant review, and amended whenever necessary in the interests of safety or for control of pollution and noise. In Great Britain private cars and light vans which are three or more years old must be tested annually at private garages authorised as test stations. In Northern Ireland private cars eight or more years old are tested at official vehicle inspection centres. Heavy goods vehicles are tested annually at government test stations. Public service vehicles must be specially approved before being licensed to carry passengers, and are tested at regular intervals. Any vehicle may be stopped on the road at any time by the police and examined.

Road haulage

There are some 145 500 operators in the road haulage industry, many of which are small firms – the average size of a vehicle fleet being only about four. Most of the industry is privately owned, but the largest operator in Great Britain is the National Freight Corporation (NFC), a public corporation established under the Transport Act 1968, to operate road and intermodal freight services. Its turnover amounted to £326 million in 1976 and at the end of that year it owned or leased 21 300 vehicles, 16 000 trailers and 12 100 containers and demountable bodies. The government's policy is to extend public ownership in the road haulage industry. Public haulage (private road hauliers and the NFC carrying other firms' goods) accounts for 62 per cent of freight carried in Great Britain in terms of tonne/km. In Northern Ireland the biggest operator is Northern Ireland Carriers Ltd, owned jointly by the Northern Ireland Transport Holding Company and the NFC.

Under the Transport Act 1968 those operating vehicles of over 3½ tonnes gross weight (with certain special exemptions) require an operator's licence, obtained on

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showing good repute and ability to maintain vehicles properly and control loading and hours worked by drivers. It may also be necessary to demonstrate adequate financial resources for compliance with these conditions. Over one million goods vehicles not exceeding 3½ tonne gross laden weight are exempt from operators' licensing.

Regulations control the emission of smoke and noise by lorries and the carriage of dangerous goods by road. There are limits on the hours worked by drivers of goods vehicles. International road haulage is governed mainly by bilateral agreements, concluded with 22 other European countries, which authorise British road hauliers to carry goods to or through these countries. Permits are required in some cases, in most of which the number is limited to a quota negotiated annually. Within the EEC there is also a community quota which authorises holders of a limited number of permits to carry out hire and reward operations between any two member countries.

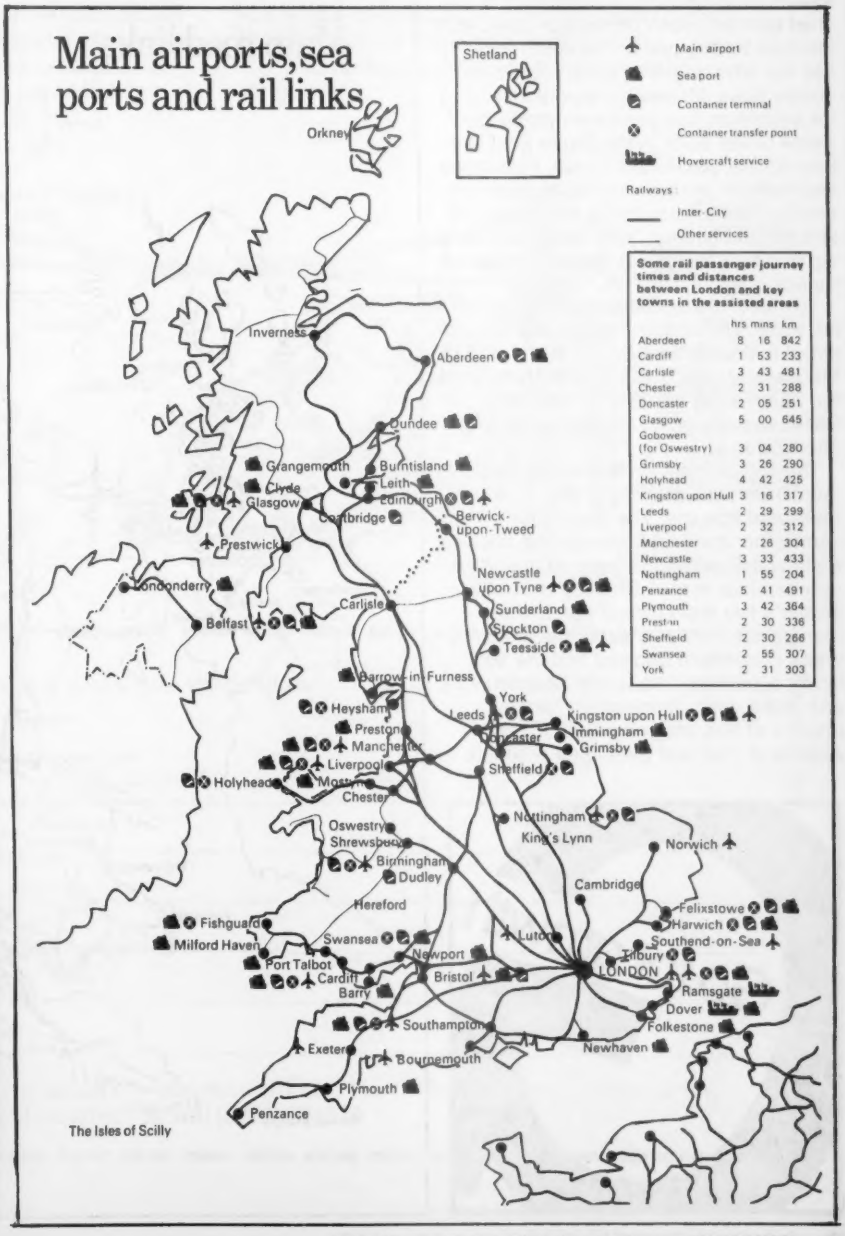
Railways

Railways in Britain first came under government direction during the first world war, but it was not until after the second world war, in 1947, that the railways in Great Britain came into public ownership as a single enterprise. In 1963 the British Railways Board was set up with sole responsibility for managing railway affairs, and in 1973 the board and the government completed a comprehensive review of railway policy. It was concluded that a railway network of roughly the present size and quality could be maintained only through continuing and substantial financial support from the government. Accordingly, since the beginning of 1975, the board has been compensated by the government for the net annual loss of operating the rail passenger network.

In recent years the most important developments have been the replacement of steam by diesel and electric traction, completed in 1968; the introduction of high-speed, regular-interval inter-city passenger services; and an increase in freight trainload traffic, allowing higher speeds, and greater mechanisation in the carrying of coal, other bulk commodities and containers. The standards of track and signalling are being raised to allow running speeds in excess of 125 mph (200 km/h). Regular interval High Speed Trains already connect London and the major cities with the assisted areas, and Britain's unique 150 mph Advanced Passenger Train is due to enter service on the London-Glasgow route in 1979. The most important freight commodities handled in 1976 were coal and coke (97 million tonnes) and iron and steel (29 million tonnes). In recent years attention has been directed towards other traffic, especially petroleum products, cars and motor components, refuse, roadstone and construction materials, and containers.

The efficiency of freight operations is being improved as new types of wagon are introduced with larger capacities and capable of higher speeds; a network of regular high-speed freight services using these new wagons is being established. Freight traffic is being concentrated at fewer and better equipped and sited marshalling yards and terminals. The installation of a computer-based total operations processing system, allowing continuous monitoring of all consignments and freight train and wagon movements in Great Britain, has reduced operating and maintenance costs by the more intensive use of rolling stock and will enable British Rail to withdraw many obsolete freight vehicles. The board is concentrating on traffic particularly suitable for carriage by rail, especially long-distance and bulk trainload traffic, often between specialised company terminals. Long-term contracts are in operation for the carriage of cars, oil, china clay, milk, newspapers, grain, chemicals, coal, steel, refuse, and sand and gravel aggregates. The 'merry-go-round' system, whereby trains are loaded and discharged automatically while in motion, is being used increasingly where there are heavy flows of mineral traffic, such as the carriage of coal to power stations and iron ore to steelworks. Express container services are operated by Freightliners Ltd.

Discussions initiated by the government



Some rail passenger journey times and distances between London and key towns in the assisted areas

	hrs	mins	km
Aberdeen	8	16	842
Cardiff	1	53	233
Carlisle	3	43	481
Chester	2	31	288
Doncaster	2	05	251
Glasgow	5	00	645
Gobowen (for Oswestry)	3	04	280
Grimsby	3	26	290
Holyhead	4	42	425
Kingston upon Hull	3	16	317
Leeds	2	29	299
Liverpool	2	32	312
Manchester	2	26	304
Newcastle	3	33	433
Nottingham	1	55	204
Penzance	5	41	491
Plymouth	3	42	364
Preston	2	30	336
Sheffield	2	30	266
Swansea	2	55	307
York	2	31	303

are in progress between many of Britain's largest firms and the British Railways Board on the potential for transferring more freight to the railways.

Ports

Over 335 million tonnes of cargo a year pass through the ports of Great Britain. Coastal traffic accounts for over 92 million tonnes, consisting mainly of petroleum and coal. Of some 181 million tonnes of imports from overseas, about 99 million tonnes consist of petroleum and petroleum products. Manufactured goods form about two-fifths of exports.

A large proportion of the general cargo traffic through British ports is handled by unitised transport methods in containers and roll-on goods vehicles, which carried 32 million tonnes of goods in 1976. London, Felixstowe, Dover, Southampton and Hull all handled large amounts.

London is Britain's largest port for non-fuel traffic. In 1976, 44 million tonnes of goods were handled, including 24 million tonnes of petroleum. Southampton is the chief port for ocean passenger traffic and the main trading port on the south coast. It has the advantages of deep water and double tides. Medway is an important port for petroleum and petroleum products. Some of the ports in the South East and East Anglia, particularly Dover, Felixstowe and Harwich, are growing rapidly with modern facilities especially for roll-on/roll-off and container traffic. Dover is Britain's leading port for passengers and roll-on/roll-off traffic.

Liverpool is a very important export outlet, especially to countries outside Europe and the Mediterranean. The inland port of Manchester, reached from the Mersey via the 36-mile (58 km) Manchester Ship Canal, exports manufactured goods and chemicals.

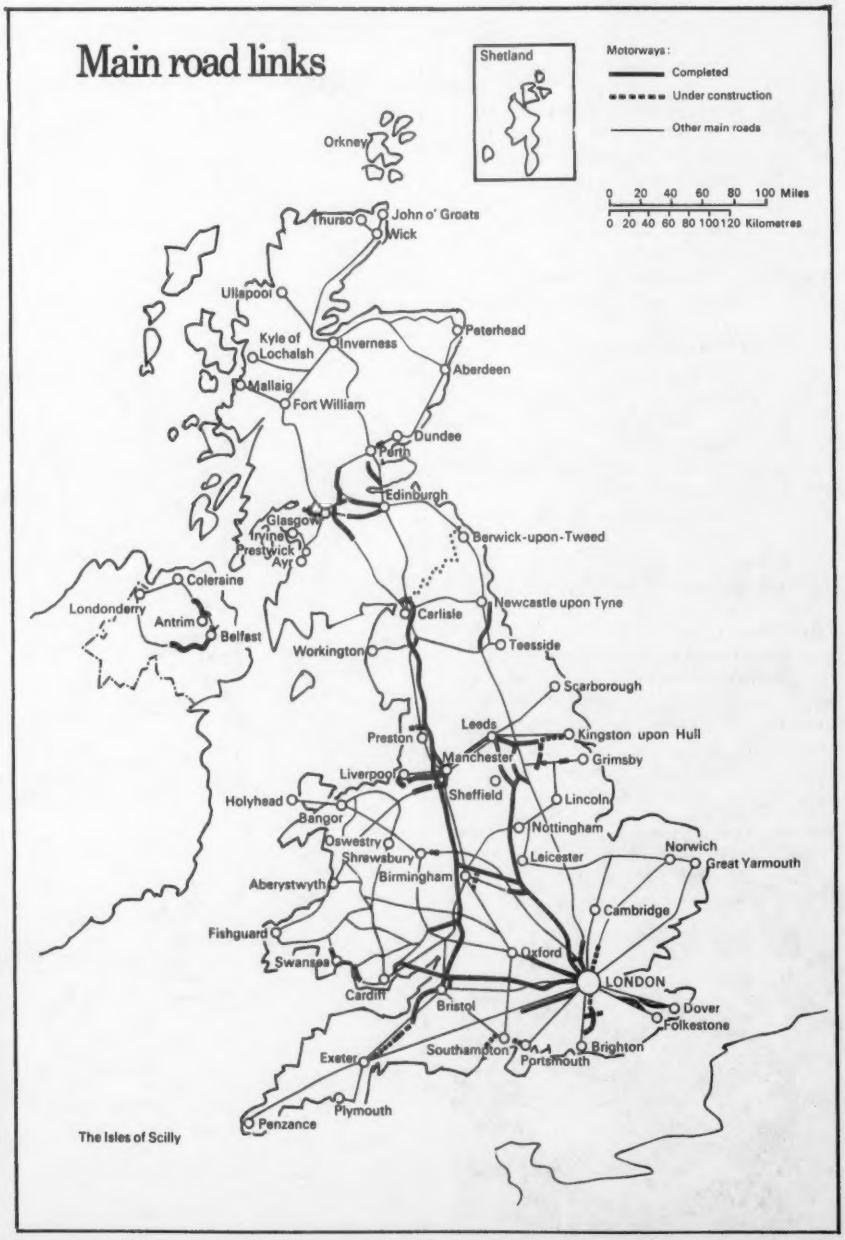
The port of Tees and Hartlepool handles petroleum products, chemicals, iron and steel, and iron ore. The port of Tyne and some other north-east coast ports, such as Blyth and Sunderland, have an important outward trade in coal. Grimsby and Hull are Britain's two main fishing ports; with Immingham they also serve the industrial areas of northern England and the Midlands, especially in trade with Scandinavian and Baltic ports. Immingham handles imports of iron ore and crude oil and exports of coal and petroleum products.

Milford Haven, handling 43 million tonnes a year, is Britain's major oil port and now Britain's leading seaport in terms of tonnage handled. Much of the traffic through the other south Wales ports is connected with the local steel industry – imports of iron ore and exports of iron and steel, and tinplate.

In Scotland the principal port facilities serving the central industrial area are Greenock (handling particularly containers and raw sugar) and Glasgow (iron ore and grain) on the Clyde, and Grangemouth (containers and timber) and Leith (grain and whisky) on the Forth. The Clyde also has a major crude oil terminal at Finnart. Aberdeen is Britain's third largest fishing port. Belfast is the principal port of Northern Ireland and with Larne handles the main traffic across the Irish Sea.

Modernisation of the ports industry has been taking place in recent years, as a result both of the increase in Britain's trade, especially with other European countries, and of technological changes affecting sea-going traffic. The growing size of tankers and bulk carriers has necessitated more deep water berths, while development of mechanical handling methods, packaging of general cargo, containers and 'roll-on/roll-off' services has created a demand for new types of port facilities.

A major development at Tilbury, Port of London, costing £30 million over a number of years, has provided 12 deep-water berths, four of them for container traffic, and a riverside grain terminal. A £16 million container terminal is to be built at Tilbury for completion in 1978. Another major scheme has been the construction of the £50 million Royal Seaforth dock complex at Liverpool which provides 10 deep-water berths including four container berths, a grain terminal and refrigerated meat berth, and two timber berths. A new dock at Bristol at a cost of some £37 million which provides six



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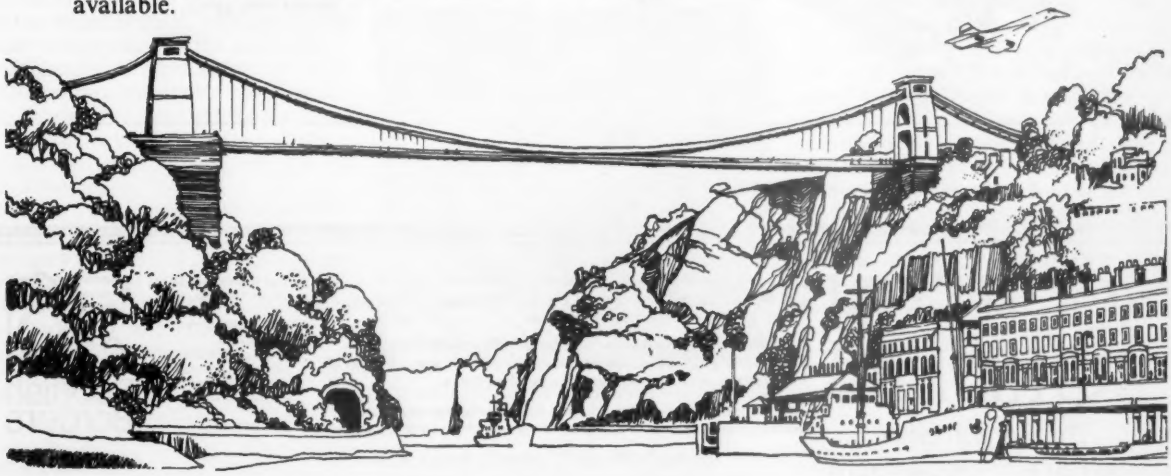

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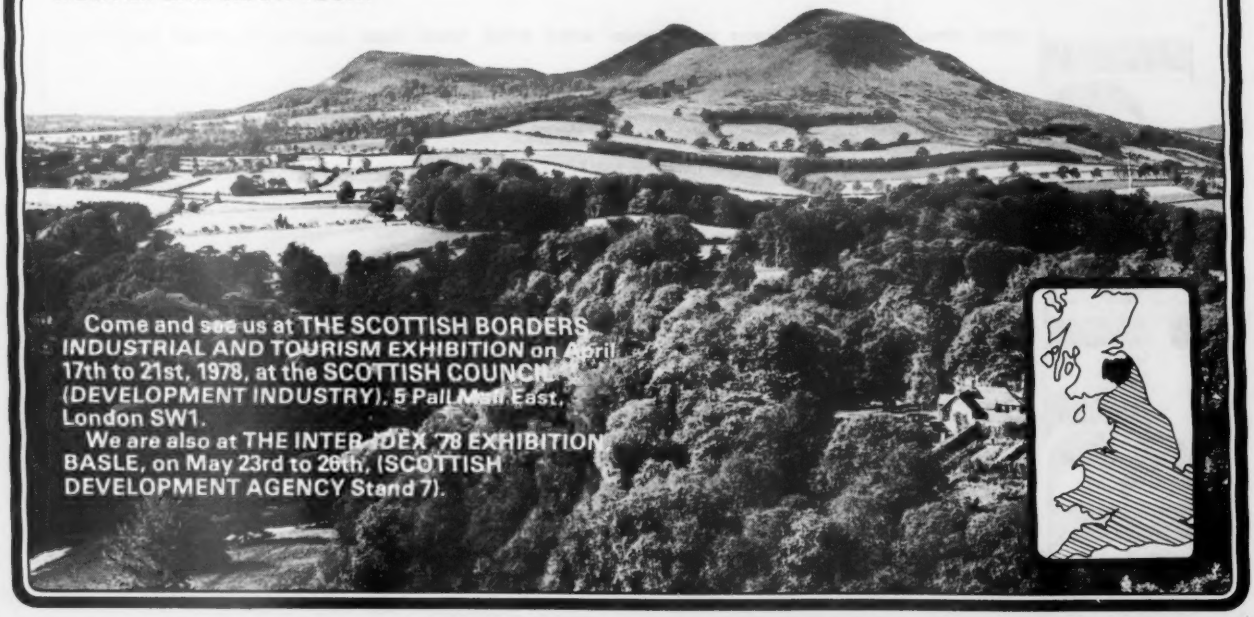
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berths and has the largest entrance lock in Britain. Deep-sea container facilities have also been constructed at Felixstowe, Greenock on the Clyde, Manchester and Southampton, where new facilities are being built to accommodate the container service to South Africa, due to start in 1977. At Hull a major extension of roll-on/roll-off facilities was completed in 1974. In Northern Ireland an expansion scheme at Warrenpoint, providing new container and roll-on/roll-off facilities, was completed in 1975. An £8 million terminal for cross-Channel hovercraft is being built at Dover. Modern ore terminals have been built at Port Talbot, Redcar and Immingham and a £25 million terminal for handling iron ore and coal is being built at Hunterston on the Clyde. Construction of an £8 million terminal at Peterhead (Grampian), primarily to handle fuel oil for the power station which is under construction began in 1976.

Air transport

Finally, air transport, which practically speaks for itself in the UK – a major international aviation centre since commercial aviation began in the 1920s.

Many of the millions of travellers who pass through Heathrow or Gatwick, London's two major airports, each year quite probably are unaware of the extensive internal air network which exists within the UK. The country has shuttle services between London, Scotland and Northern Ireland, and all the principal development areas are well served by international airports of their own.

There are 123 licensed civil airfields in the UK, which handled a total of 45.9 million passengers in 1976 (29.5 million of these were through either Heathrow or Gatwick). In that year the value of overseas trade by air rose by 28 per cent to £8,564 million, the main commodities being machinery, medicinal and pharmaceutical products, and diamonds.

Good systems

However you wish to travel, the systems are good, limited only infrequently by the weather. Even then the telephone and telex system can be relied upon to carry your communications if not your freight or yourself – and the climate is such that one type of weather rarely lasts in these islands for more than a few days at a time.

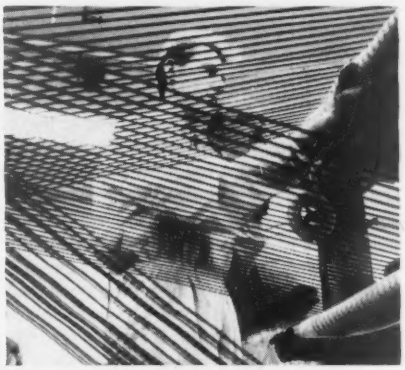
Confidence in Britain

There is no shortage of managers of foreign companies located in Britain who say unhesitatingly that they are happy about their investment decision.

Country-wide

Although, strictly speaking, 3M United Kingdom began in Britain before the second world war, the story more properly started after the war when it was a small company based in Birmingham. Today the company has a turnover in excess of £79 million and empoys 3900 people.

Associated with the Minnesota Mining and Manufacturing Company, 3M United Kingdom manufactures for domestic and export markets many types of pressure sensitive tapes, video and professional recording tapes, abrasives, many products for the printing industry, adhesives and other assorted goods. The company's head office is in London but its seven plants are all located in designated development areas.



Slitting jumbo rolls of tape at 3M's magnetic tape plant at Gorseinon, near Swansea.

Managing director Donn R. Osmon describes 3M UK as 'a success growth company whose experience, generally has been a positive one. Our industrial relations problems', he says, 'have been very small and certainly well in line with activities in other industrial companies.'

3M UK has a tradition of heavy investment in manufacturing and marketing and, says Mr Osmon, 'We continue to invest in the UK and have recently determined to extend our head office facilities with a new development in Bracknell in Berkshire.'

Northern England

Peterlee

Nippon Seklo Kabushiki, NSK Bearings (Europe) Ltd, a leading manufacturer of ball and roller bearings in Japan, commenced production in Peterlee New Town in April 1976 as the first Japanese company to locate in the northern region. The company was established in Japan in 1916 and is one of their largest manufacturers of bearings and allied products with production facilities for bearings in Australia, Brazil and the United States. The Peterlee factory is their fourth overseas plant and the location was decided upon after detailed investigation had been carried out throughout the EEC countries, with the purpose of establishing a production base to cover the EEC market. Exports from the Peterlee factory already account for about 90 per cent of production and the undertaking represents an important element in export earnings and import savings for the United Kingdom. Masao Hasegawa, the president of NSK, said in 1976 that their location decision was made, 'Not only because Peterlee provided all the econonmic requirements for establishing a factory but also because we were given a better understanding and sincere reception from the people involved in the northern region and Peterlee.'

North Shields

Elmwood Sensors Inc of Rhode Island, USA, established Elmwood Sensors Ltd in a 1400 m² Department of Industry advance factory at North Shields in November 1974 to produce bimetal thermostats. Since then the pace of development has exceeded expectations. Currently well over 200 people are employed on a shift system operated to cater for part time employees.

Mr Nathan, chairman of the board of Elmwood Sensors Inc has gone on record as saying, 'Our employees certainly give us a full day's work and have gone out of their way to help us get started.'

Crook

Kenmore Refrigeration Equipment (UK) Ltd, whose parent company is Kenmore Holdings A/S, Norway, are manufacturers of specialised refrigeration equipment. They are major suppliers of evaporator shelves to United Kingdom manufacturers of upright freezers. They also manufacture PVC/Nitrile insulation tubing, 75 per cent of which is exported to many countries including Germany, France, Australia and the Far East.

Lynemouth

Alcan UK Ltd, a member of the Alcan Aluminium Ltd of Canada group of companies, is the largest supplier of primary aluminium in the United Kingdom. The Alcan smelter complex at Lynemouth on the Northumberland coast was commissioned in 1972, occupies an area of some 120 hectares and has an annual capacity of 120 000 tonnes. A special feature of the complex is that it incorporates the company's own 390 MW coal fired power station which is supplied directly from the adjacent Lynemouth-Ellington colliery. Raw alumina for the smelter is imported through a specially constructed ship unloading and materials storage facil-

ity at Blyth harbour which is capable of handling ships of up to 22 000 tonnes. In addition to the substantial contribution to the United Kingdom balance of payments, Alcan's activities at Lynemouth have had a major impact on the economic development of the north east special development area.

North West England

Moreton

In Moreton, on Merseyside, E. R. Squibb and Sons Ltd, a well-established member of the world-wide Squibb Corporation of the United States, has expanded steadily over the past decade. Squibb began manufacturing pharmaceuticals in Britain in 1949, initially in Speke, Liverpool. But production demand outgrew facilities and the company moved to Moreton and began operations in 1967.

A new international development laboratory was built adjacent to the factory and opened in 1972. Today work is going ahead on a £2 million extension to the factory which will be used for additional warehouse and packing operations while also releasing space for the expansion and upgrading of existing production facilities.

The company is investing in success. Production has increased four-fold at Moreton in 10 years and more than two-thirds of it is exported to 112 different countries. Colin Campbell, production director, readily acknowledges that government investment incentives were a consideration in the company's choice of location. But, he says, 'I don't think that anyone could ever say that we were wrong to come here. Merseyside is well served by rail, roads and the port of Liverpool. It is a centre for communications not only within Britain but in the world.'

Knowsley

Cross International, an American-owned automated machine tool company, started operations at Knowsley, near Liverpool, in 1969. Since then it has undertaken two big expansion schemes, the latest, announced this autumn, is a £2½ million project which will raise the company's labour force from 290 to 500 and is expected to generate a further 200 jobs among suppliers. In the eight years in which it has been in the United Kingdom the company has never had an industrial dispute.

Cross is a supplier of manufacturing systems to the motor and allied industries and the new expansion is aimed at achieving a £10 million a year output by mid-1978 by doubling the size of its Merseyside plant.

The British government is providing about £¾ million towards the project through development grants and aid under the machine tools industry scheme. Michael Bright, Cross's managing director, says that the government scheme accelerated the company's decision to go ahead with expansion.

Cross is heavily export orientated. Last year, the company delivered £6 million worth of exports to Poland, having won the order in face of strong American and German competition.

Runcorn

YKK, Yoshida Kogyo, is the largest manufacturer of zip fasteners in the world. The company set up a manufacturing plant at Runcorn in 1972 and now employs over 300 people. A recently announced further expansion will bring the labour force up to 500. The company chairman, Susumu Takahashi, said that there were three main reasons which clinched their decision to come to the United Kingdom – the good communications system in the north west made it a good point from which to export, there was no problem in obtaining labour, and Runcorn being in a special development area enabled the company to take advantage of the government's incentives.

Manchester

Fluor Great Britain Ltd, design engineers for the petroleum, petrochemicals and chemical industries, chose Manchester because of the good communications and the abundance of skilled labour.

Bootle

One company which foresaw the tremendous boost which North Sea oil would give to the economy was Cooper-Bessemer (UK) Ltd. Cooper-Bessemer at Bootle, Merseyside, is a subsidiary of a giant United States company and is their only manufacturing plant outside North America. Production started in May 1975. The company is in the oil and gas transmission equipment business. Using an industrialised version of the Rolls-Royce Avon engine, Cooper-Bessemer assembles and tests jet-driven turbines with compressors on the end and manufactures the skid on which the unit stands.

Business is good and expansion has been rapid. After starting with only 10 employees the company now employs 175 people at Bootle and five in a London sales office. In 1975 turnover was £2,115,000 and exports were worth £1,800,000. The following year turnover reached £8,400,000 and exports £3,600,000. For last year, Tony Melhuish, manager of finance and personnel, expects turnover and exports to hit £12 million and £11 million respectively. Projected 1978 figures are for turnover of £17 million and exports of £15 million.

Cooper-Bessemer sub-contracts work all over the country and also buys in a lot of proprietary items. At present the company is engaged on an order from the Soviet Union for 21 turbine compressor sets which are being completed at a rate of two a month. The company makes good use of the facilities offered by Britain's Export Credits Guarantee Department. Its main markets are in the Middle East but the British Gas Corporation and the oil companies operating in the NorthSea are also big customers.

Mr Melhuish is critical of some trade union restrictive practices. 'Demarcation lines,' he says, 'are strong, which is something we had anticipated, but not to such a large extent.' The government's grants and incentives, he thought, were very attractive and helped to sway Cooper-Bessemer in its choice of location. 'The interest relief grant, in our view, was very generous,' he said.

Yorkshire and Humberside

Doncaster

Britain has more money invested in the United States than in any other country and Britain has long been a favourite with American investors. 'I do not know anywhere in the world where we can invest a dollar and get a better return,' said Jack Smith, managing director of the International Harvester Company of Great Britain, subsidiary of International Harvester of America, recently. 'In the United Kingdom, we will continue to produce high quality tractors at a lower price than anywhere else,' he said, announcing a £6 million expansion programme for this year.

The end of the production line at the Doncaster plant of International Harvester.

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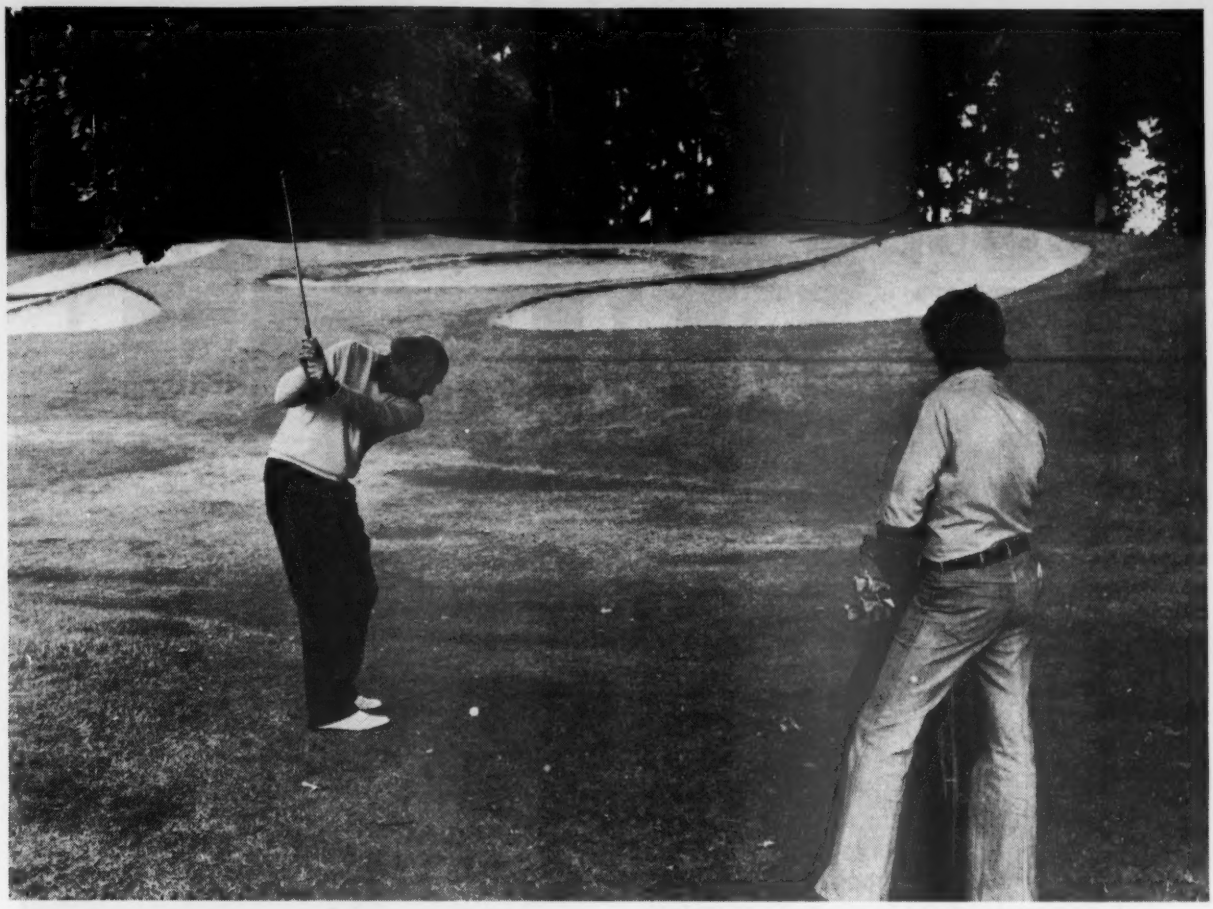
DEVON: Andrew Smy, County Estates Surveyor, County Hall, Topsham Road, Exeter EX2 4QQ. Tel: (STD 0392) 77977. Telex 42707.



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You'd never guess that you were only a few minutes from central Newport when you're playing at Rogerstone. Yes excellent communications and fine leisure facilities are just two of the many reasons why Newport is the natural choice for industrial expansion.

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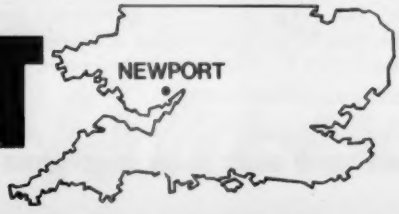
Don't handicap yourself — find out more about the part Newport could play in your company's future — contact the Chief Executive, Civic Centre, Newport, Gwent.
Tel: 0633 65491.

NEWPORT

where business has room to boom.



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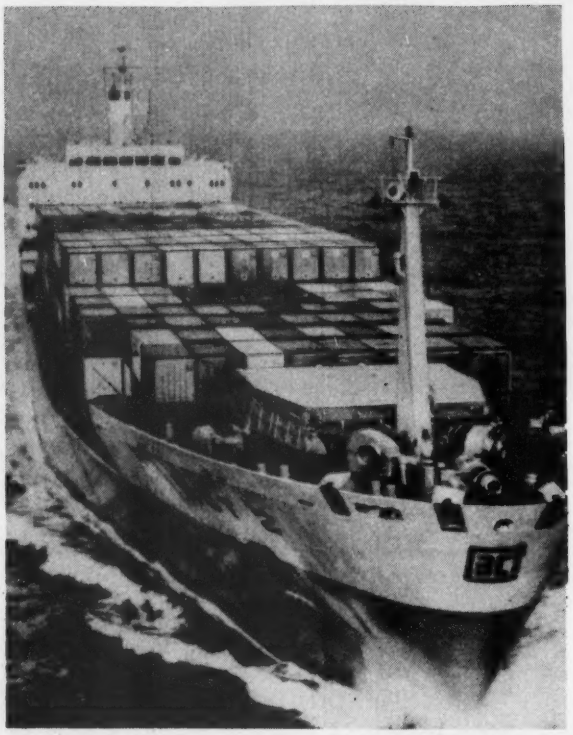

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Tel: England 051-227 3296.

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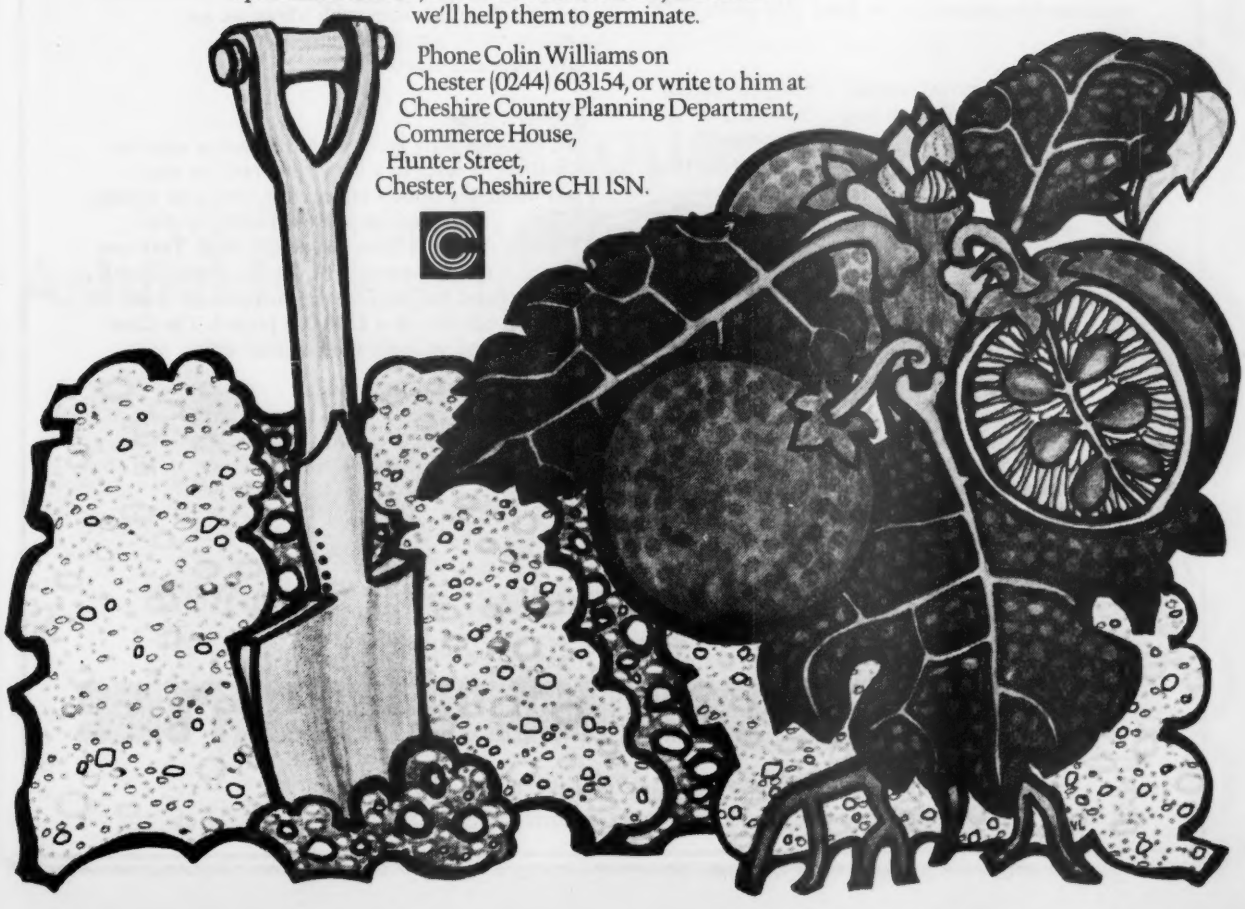
Phone Colin Williams on Chester (0244) 603154, or write to him at Cheshire County Planning Department, Commerce House, Hunter Street, Chester, Cheshire CH1 1SN.



When a client comes back 16 times in 10 years...

you've got to be doing something right

Palmer & Harvey Ltd, Europe's largest wholesale tobacconist and confectioner, is but one example of what we have been building for nearly 200 years – lasting associations. In the past ten years, Walter Lilly – a Lovell Construction company – has carried out no less than 17 contracts for them, constructing warehousing and offices in various parts of the country, as well as many other projects involving alteration and refurbishment.

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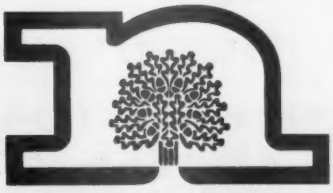
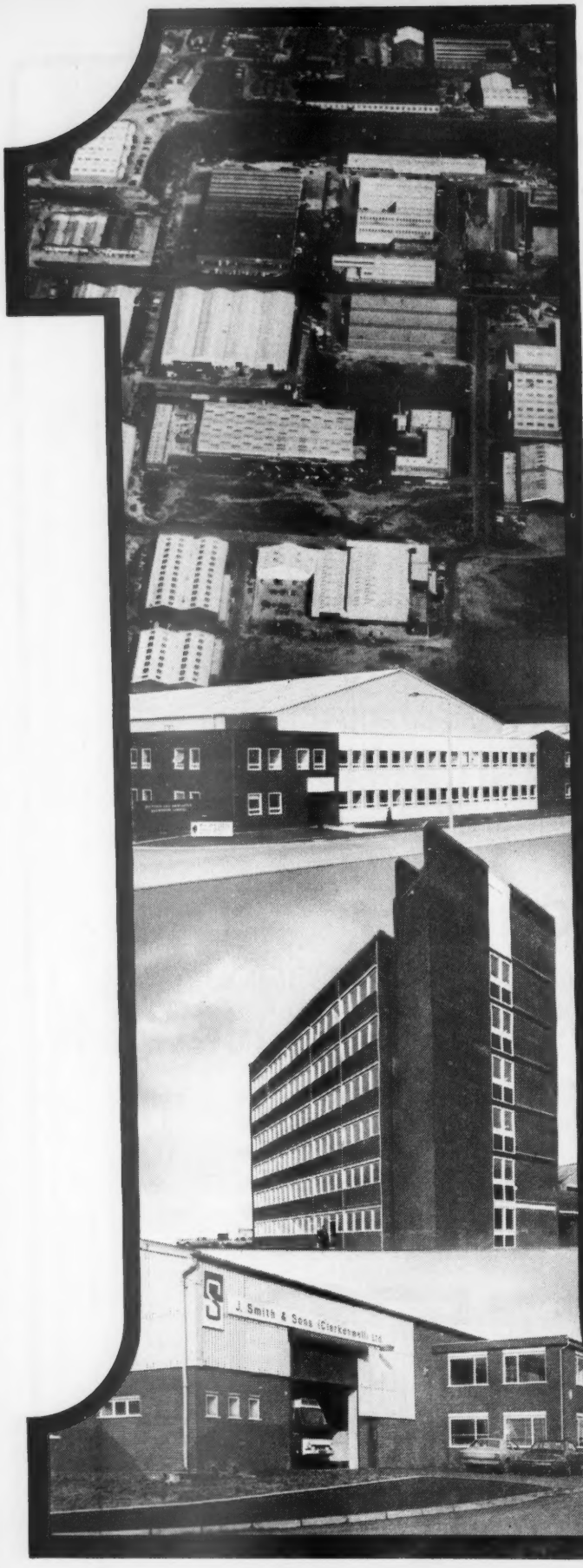


Nottinghamshire County Council



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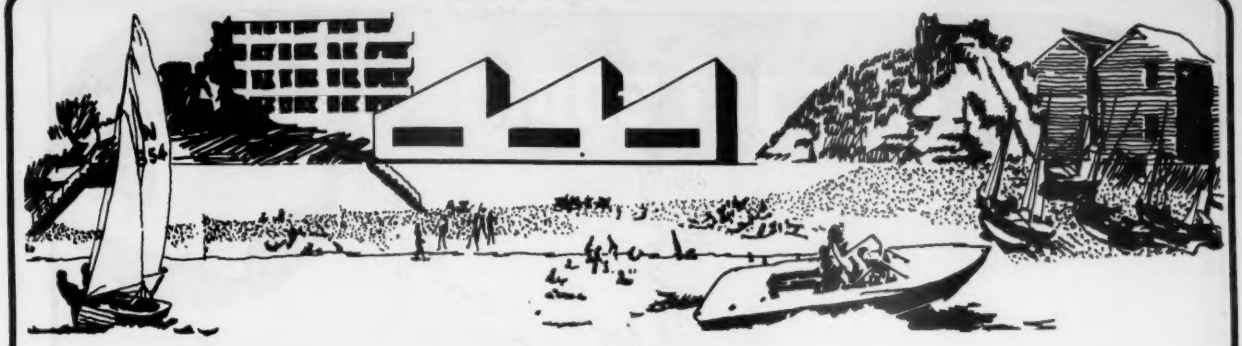

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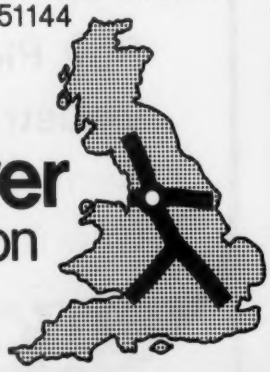

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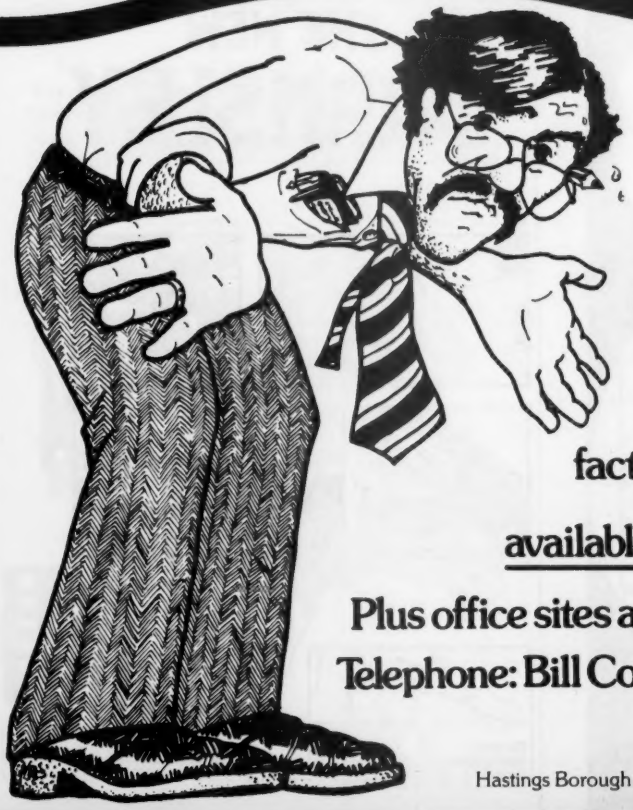
(Tel: Basildon (0268) 553261. Answer Service after 5.15 p.m. Basildon 553377).

BASILDON MEANS BUSINESS



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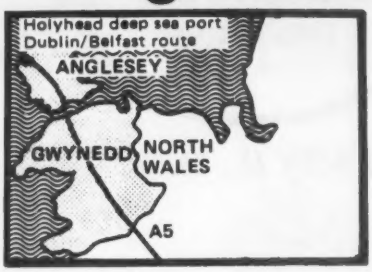

No favouritism in Gwynedd

All companies thinking of coming to Gwynedd whatever their size and operation can expect to receive the same help and assistance from our Economic Development Office.

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How to get expansion moving

Contact: E. Lloyd Evans, Economic Development Office, Gwynedd County Council, County Offices, Caernarfon LL55 1SH. Tel: Caernarfon (0286) 4121

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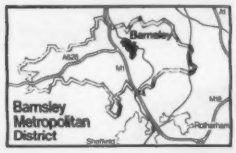
THE NEW BARNSLEY

One of the factories on the Platts Common Industrial Estate Hoyland, Barnsley

SEKURA, a Danish Company, manufacture Safety cabs in Barnsley

Barnsley Technical College

A typical Government Advance Factory on the Carlton Industrial Estate, Barnsley



For details on industrial development facilities contact:
Michael Wedgeworth, Industrial Development Officer, 8 Eastgate, Barnsley. Tel: 88489 (STD 0226)

In Clwyd today 123,000 people went to work as usual

Clwyd's multi-skilled 123,000 strong workforce has preserved quite a number of old-fashioned virtues.

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It's only one of the factors that convinced such diverse, internationally-known organisations as BICC, Dunlop, Kelloggs and Pilkingtons that Clwyd was the right place to invest.

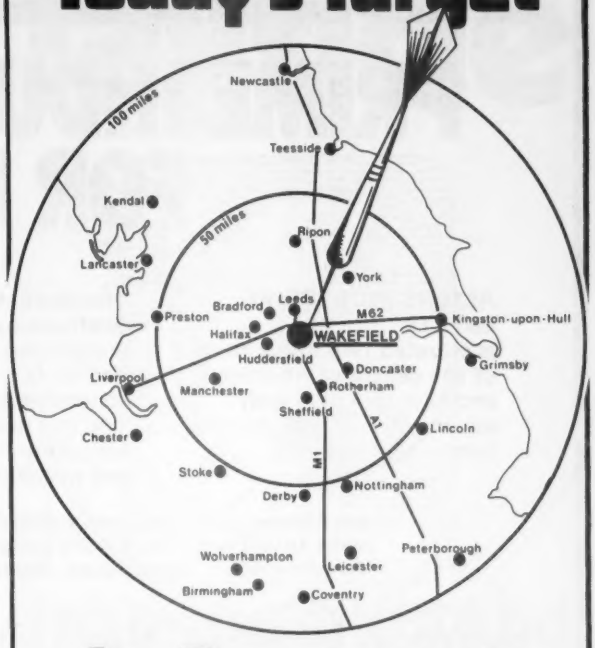
Among other factors are Clwyd's excellent communications – easy access to road, rail and air networks and proximity to the north-western seaports, readily-available factory units or sites and extensive financial aid.

And one more of Clwyd's quaint old-fashioned virtues – it's an outstandingly pleasant place to live and work.

Get the facts on Clwyd. Write to Wayne S. Morgan, County Industrial Officer, Shire Hall, Mold, (Tel: Mold 2121) for a free colour brochure.

CLWYD -at the peak of Welsh potential

Today's Target



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City of WAKEFIELD METROPOLITAN DISTRICT COUNCIL

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Premises Available:
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and we'll show you

A VIABLE LOCATION

in

NORTH YORKSHIRE

As well as glorious scenery and a way of life that matters most, England's largest county contains definable, and indefinable, qualities that spell success for its newest light industries.

When a company director (engineering) declares: 'I should have come here (from somewhere in the south) years ago' the reasons must be worth inquiry?

Most say it's the labour, its character and stability; the communications, the ease of going anywhere on business or pleasure; plus probably a country home of one's dreams.

There are financial incentives, too, in North Yorkshire's Development and Intermediate Areas; and the County Council operates an industrial mortgage scheme.

But the greatest total encouragement is our newcomers' consistent success rate.

Make no mistake, there is something special behind it, and that something special is North Yorkshire and its people.

INQUIRY: B. H. Belshaw, Industrial Promotion Officer, North Yorkshire County Council, County Hall, Northallerton, North Yorkshire DL7 8AD.
Tel. (0609) 3123 Ext. 341

Tayside

strategic sites and factories for growth companies

Tayside is one of Scotland's fastest expanding East Coast Regions. New industrial estates, as well as individual factories and offices are now being developed—both to service North Sea projects, and to meet expanding European trade.

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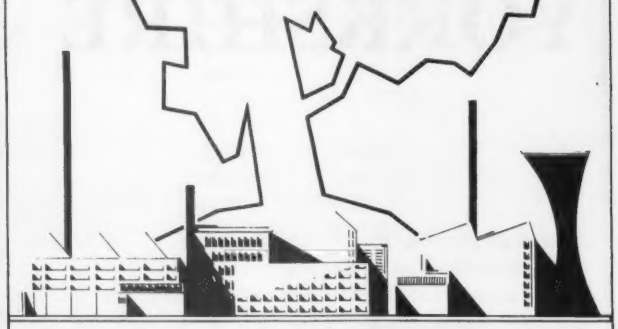

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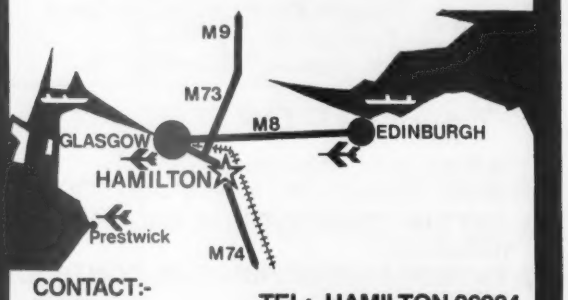

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* Audit Bureau of Circulation certified average circulation for 1976: 13 788 copies. Readership survey carried out in April 1976 gives estimated readership of over 50 000.

Trade and Industry: the decision makers' magazine.

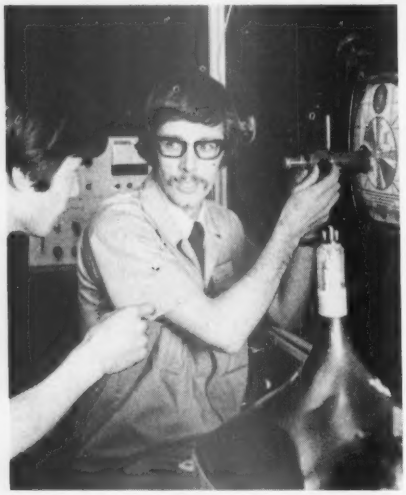
Wales

Pentwyn

Matsushita Electric which sells under the National Panasonic and Technics brand names came to Britain by invitation. In fact the company has an inflexible policy of locating a factory outside Japan only in response to a specific local invitation to do so. In the case of their Pentwyn, Cardiff, factory it was a trade delegation from the Welsh Development Agency which talked them into looking at the prospects in Wales.

There were several factors which persuaded Matsushita that the United Kingdom was an attractive base. 'First, its membership of the EEC', says the company. 'Secondly, the fact that it was, and is, one of Matsushita's best markets in Europe, and as such a natural place to build a factory that would soon be contributing to local economic life. Thirdly, the Cardiff area clearly possesses good communications, had available labour, and there was no shortage of local suppliers.'

The £2 million plant is now in full production of a new 22-in colour tv set and up to half of future production is earmarked for export. British suppliers account for 70 per cent by value of the new set's components including the all-important tube, 'and it is hoped to increase this proportion'.



Alan Chapman, production and quality manager at Matsushita's Pentwyn factory checking the quality of cathode ray tubes.

Since Matsushita is purchasing a high proportion of its components from British suppliers, the company is 'directly assisting employment in supplier companies' and, claims the company, by adhering to exceptionally high quality standards, 'we believe we are helping local suppliers to optimise their production controls and efficiency.'

Ebbw Vale

Georg Wilhelm Henrich is the director of Alfred Teves at Ebbw Vale in South Wales, which is part of a German group which manufactures braking systems. He is sure that the group is happy with its investment in South Wales. He says that 99 per cent of the problems which he has had to deal with since starting up in 1974 have been either technical or training problems.

Full production capacity has now been reached and he is satisfied that, 'it is possible to achieve the same level of productivity here as in Germany.'

At present the workforce number 115 but more people were taken on last year as new new production lines were opened up and new customers gained. Until now all production has been going back to Germany to supply Volkswagen and Audi. Last year Herr Henrich started supplying braking systems for British made cars.

Crumlin

Herbert Zippel (UK) is a firm of German parentage which has set up operations in South Wales. At Crumlin, in Gwent, the firm currently employs a workforce of 45 making filing and information retrieval systems which are selling well to health service authorities and other bodies in the public sector. The company secretary, Mrs B. Taylor, stresses the good working relationships which have been developed in the factory since it opened in October 1971 and says 'I am sure the German company can have no regrets at all about starting operations here.'

Scotland

Irvine

Bengt Nilsson, factory manager of SKF (UK) Ltd, a company in Irvine, Ayrshire, which makes bearings and pressed components and whose parent company is Swedish, is full of praise for his workforce: 'The labour force is of very good quality. We have absolutely no problem finding skilled labour – toolmakers, maintenance fitters, plumbers, electricians or setters – or less skilled trades.'

Glenrothes New Town

Miss Birgitta Sjoberg, from Sweden, is the owner of Ali-Elephant Ltd, manufacturers of children's fashion-wear, at Glenrothes New Town, Scotland. She opened her factory in 1973 when she was 22 and initially employed seven women machinists. Today Ali-Elephant occupies a modern 930 m² factory and provides work for 45 people, including two men who cut garments which Miss Sjoberg designs.

As the daughter of a Swedish textile manufacturer Miss Sjoberg took an early interest in clothes designing. The time came when she wanted to launch out on her own by starting an independent company. She had to start in a small way, said Miss Sjoberg, but such a project was impossible in Sweden because of the high labour costs. After looking at the possibilities in Finland, France, Portugal and Ireland, she chose to start her business in the UK.

'I chose Britain,' she says, 'because English is the first foreign language in Swedish schools. I would conduct business there and communicate with employees without difficulty.'

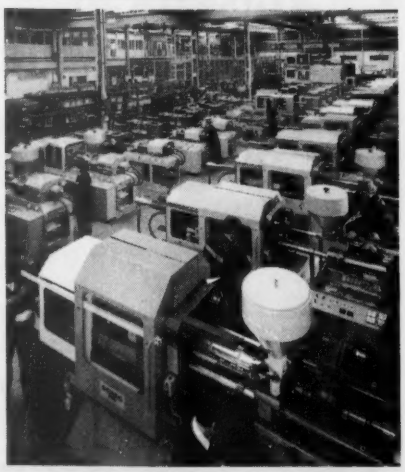
Miss Sjoberg chose Glenrothes because she liked the environment. The fact that the town was in a government-designated special development area was also a help in starting a new project for she was given help through grants and tax concessions. These could make all the difference in getting a small business enterprise successfully launched, she believes.

Her range of children's wear is marketed in her native Sweden and elsewhere in Europe and Scandinavia, but Miss Sjoberg has also undertaken substantial clothing contracts for Britain's national health service, supplying nurses' garments, and for the British armed forces.

Northern Ireland

Portadown

At an investment seminar in Kassel, West Germany, last year Christoph Fischer, managing director of Demag Plastics Machinery Processing of Portadown, Northern Ireland, said that productivity at his plant was about the same as at the firm's mother plant in Duisburg. Independent testers had confirmed that quality was just as good as in Germany, if not a little better.



Assembly and test run area for injection moulding machines at Demag's Portadown plant.

Europe's largest cabinet furniture manufacturers are making themselves at home in Telford.

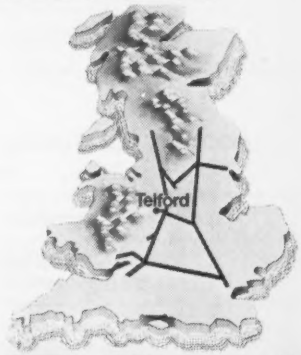
Welle is an important company which had very specific requirements for the warehouse and headquarters of its distribution operation in the UK. As Europe's largest cabinet furniture makers, with manufacturing concentrated in West Germany, their UK location had to be within easy reach of Germany by road. Equally important, it had to be central to the UK, with good communications in all directions.

The selected location had to offer a choice of suitable warehouse premises: good homes in a pleasant environment were needed for their valued personnel; and the company required positive assistance and co-operation from people on the spot for the legal, organisational and financial aspects of setting up their distribution centre. After a thorough look at what was offered in various parts of Britain they chose Telford.

Mr. Keith Durnall, Welle's UK Joint Managing Director, says:

"We chose Telford because it has such a good central location and excellent communications with all parts of the country. The 18,000 square foot warehouse unit offered by Telford Development Corporation was just what we needed. We also liked the professional approach of the Development Team. The whole operation, from initial contact with them to our moving in, has taken less than one month."

Mr. Durnall is just one of many industrialists who like what Telford has to offer – and particularly its business-like approach, and fast answers. So if you're thinking of moving, expanding or just starting up, think Telford. It offers a great deal – and a great future.



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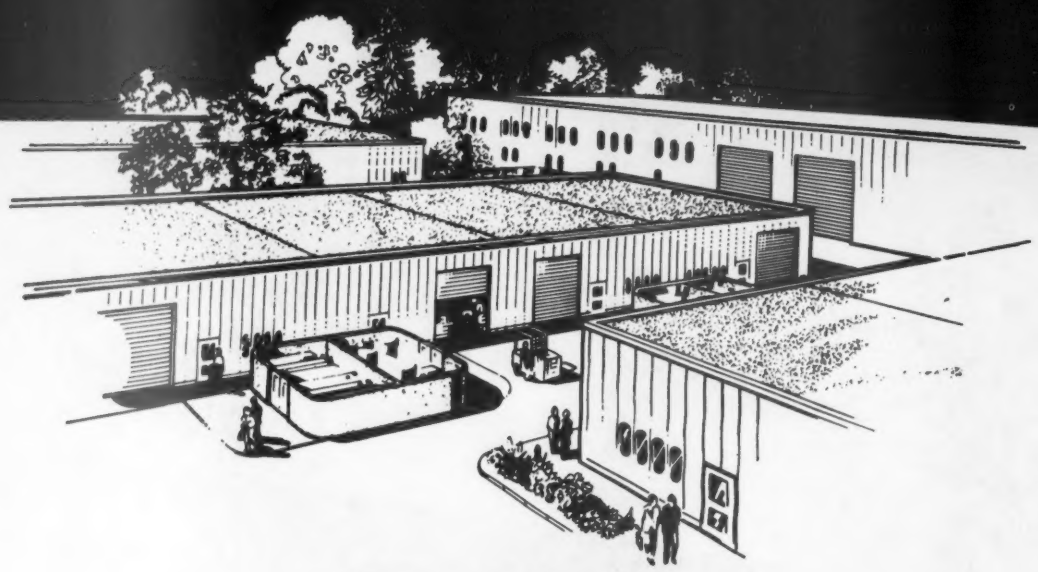

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Some facts about Britain

Inward investment

Book value of direct investments into Britain from overseas at year end 1974

	£ million
Belgium and Luxembourg	209.7
France	162.8
German Federal Republic	168.2
Italy	114.4
Netherlands	337.1
Total EEC	1084.2
Sweden	165.7
Switzerland	493.8
Total EFTA	751.7
Canada	422.3
USA	3664.0
Total WORLD	6585.3

Outward investment

Book values of net assets attributable to Britain at year end 1974

	£ million
Belgium and Luxembourg	290.2
France	459.5
German Federal Republic	626.6
Italy	198.6
Netherlands	237.3
Total EEC	2196.5
Sweden	93.9
Switzerland	113.0
Total EFTA	377.2
Canada	941.2
USA	1273.3
Australia	1747.2
South Africa	997.2
Total WORLD	10117.8

Industrial disputes

	Stoppages beginning in year	working days lost in all stoppages in progress ('000s)
1967	2116	2787
1968	2378	4690
1969	3116	6846
1970	3906	10980
1971	2228	13551
1972	2497	23909
1973	2873	7197
1974	2922	14750
1975	2282	6012
1976 (provisional)	1990	3286

Wages

Average weekly earnings (including overtime and bonuses [1]) and weekly hours of full-time manual employees in manufacturing industries (April 1976).

	Weekly earnings £	Weekly hours
Men over 21 years	65.1	45.3
Women over 18 years	39.4	39.3

Average weekly earnings (including overtime and bonuses) and weekly hours of full-time manual men aged 21 and over in various groups of industries (April 1976).

Industry Group	Weekly earnings £	Weekly hours
Vehicles	71.4	44.4
Paper, printing and publishing	70.5	44.3
Metal manufacture	72.9	44.5
Chemicals and allied industries	68.2	44.9
Mechanical engineering	66.9	45.1
Instrument engineering	62.3	43.9
Electrical engineering	64.7	44.2
Metal goods not elsewhere specified	64.3	44.9
Bricks, pottery, glass, etc	68.2	47.2
Clothing and footwear	52.8	42.2
Food, drink and tobacco	66.8	48.0
Textiles	60.9	44.7

[1] In Britain, 'bonus' usually means an extra weekly payment for output which exceeds a certain agreed level.

International tax comparisons

Married man with two children with gross earnings of £40,000 per annum taxed at 50% rate for those resident or working in Britain for part of year.

Country	% of income paid in tax
Britain	26
USA (New York City)	46
Germany	44
Netherlands	34
France	27

same man taxed at 75% rate for those resident in Britain for nine out of last 10 years.

Country	% of income paid in tax
Britain	47
USA	46
West Germany	44
Netherlands	59
Sweden	72
Denmark	55
Belgium	53
France	27

Employment

1970 = 100

	Employment in production industries	Unemployment as% of labour force	Unfilled vacancies thousands s.a.
1970	100.0	2.5	185.8
1975	92.2	4.0	145.0
1976 January-September	88.5	5.3	119.9

Manufacturing industry

	Employment	1976 per cent output
Total manufacturing	100.0	100.0
Food, drink and tobacco	9.7	12.1
Chemicals, coal and petroleum products	6.5	10.5
Metal manufacturing	6.6	6.3
Engineering and allied industries [1]	45.4	41.3
Textiles, leather and clothing	12.5	10.0
Other manufacturing	19.3	19.9

[1] Engineering and allied industries includes motor and transport vehicle (about 9% of output), and mechanical engineering (13%) which covers construction and mechanical handling equipment, office machinery, industrial plant and steelwork.

Growth of industrial production

Index 1970 = 100	All industries output	Manufacturing output
1972	102.6	102.3
1973	110.3	110.9
1974	106.4	108.1
1975	101.3	101.7
1976	102.2	103.3
January 1977	103.9	104.4
% increase in latest 3 months on previous 3 months	1.4	0.3
Average annual growth 1956-1970	2.9	3.2

Energy resources and consumption

	Reserves		Consumption	
	Million tonnes	tcf	million tonnes	tcf
Oil, proven	1350		85	
total possible	3190			
Gas, proven		28.7		
total possible		50.5		1.3
Coal	300 years accessible reserves [1]		120	
Hydro			1	
Nuclear			6	

[1] at current rate of consumption.

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Overseas trade exhibitions

Biggest-ever British participation at Paris clothes shows

From Robert Hyde, British embassy, Paris

Britain's representation at the recent Paris menswear, knitwear, and children's fashion-wear shows, from 4 to 7 February, was stronger than ever. A record number of 132 British companies participated in joint ventures at the three events, with a record number of exhibitors taking part in each of the individual exhibitions.

Among the 33 firms sponsored by the Clothing Export Council of Great Britain and Northern Ireland at the Salon International de l'Habillement Masculin (SEHM), both Cricket Manufacturing and Chatters enjoyed a lively show with their fashion casualwear, while Inigo Jones achieved excellent results with its ties and shirts. Another company to do well was Mulberry, featuring bags, belts and accessories. The British Menswear Guild sponsored a group of 22 firms, of whom Associated British Hat Manufacturers reported very good results. Aquascutum and Van Heusen were among established exhibitors again prominent, and the National Wool Textile Export Corporation were in the BMG group for the first time.

The Salon International des Industries de la Maille welcomed 48 British firms, of whom 36 were in the outerwear section, nine in underwear and three in the fabrics section, organised on this occasion for the first time at this event. If the show did not quite repeat the outstanding success of the two previous years, most British exhibitors were well pleased with results. Companies continuing to do well included Britella and Berkshire International, while the Courtaulds Group was well in evidence, being represented within the joint venture in both the outerwear and underwear sections (in the latter case through R. and W. H. Symington and Walker Reid) and participating very prominently as an independent exhibitor in the new fabrics section through its French subsidiary.

Among the record 29 firms in the joint venture under the sponsorship of the National Childrenswear Association of Great Britain at the Salon de la Mode Enfantine were seven companies new to the show. Country Bumpkins, Morvic and Pasolds (Ladybird) all did well on their first appearance, and old stagers in the group who caught the eye included Gloverall, showing an impressive range of duffle coats, David Charles and Cumberland Fashions (Tick-A-Tee), whose particular feather in its cap was to be featured on French television on the last day of the show.

There is no doubt that these three clothing exhibitions more than maintained their high international reputation, and the size and quality of the British contribution was more impressive than ever.

British food does well in Dutch market

From Lette van Oostvoorne, British embassy, The Hague.

British companies who participated in the British Food Export Council's joint venture at the twenty-first Roka international food fair at Utrecht, 13 to 17 February, were pleased with the extent of public and trade interest in their products. They all agreed that a contributing factor was the location of the British stand which was in the largest hall and had one of the best positions.

This year's fair at the Jaarbeurs exhibition complex consisted of 23 000 m² of space spread over three halls. There were many attractive displays of food equipment associated with the retail food trade and shop fittings. The total of 531 exhibitors included national exhibits from among others France, West Germany and Spain. The British stand had an attractive central position in the Bernhardhal. The steak bar provided by the Livestock Marketing Commission for Northern Ireland again proved to be a popular rendezvous for all nationalities. Representatives of the meat promotion executive of Smithfield expressed themselves as highly satisfied with the visitors' reactions. British processed foods, and especially marmalades, jams and Scottish oatcakes, were well received, not only by Dutch importers but also by buyers from other countries attending the fair. *Food News*, the informative publication on markets at home and abroad also took part in the joint venture. They met a number of their Dutch subscribers and also made contact with potential customers.

Firms, new to the joint venture and to Roka, obtained first class experience of the competitive nature of the Dutch food market. But representatives felt that the joint venture offered them a unique advantage point from which to gauge importers' reactions to their products and to make promising contacts for future negotiations.

Attendances were slightly below those of 1976, but it was generally agreed that the calibre of the visitors was higher than in previous years. Firms' successes showed once again that if manufacturers of good quality British foods who wish to extend their market into Europe, take the trouble to research Dutch tastes, they will find ready sales in the Netherlands.

Strong UK presence at Cologne's Domotechnica

From H. Mock, British embassy, Bonn

Among the 437 direct exhibitors and 66 additionally represented firms from 23 countries at this year's Domotechnica from 15 to 18 February, the British DEA and components industries supplied the second largest foreign contingent with 44 direct, and three additionally represented, firms.

British firms occupied two British Overseas Trade Board-backed joint-venture stands organised by the Association of Manufacturers of Domestic Electrical Appliances (Amdea), and the Birmingham Engineering and Building Centre respectively.

The latter sponsored 20 UK manufacturers of components, the majority of whom had been participating in this fair for a number of years. All of these exhibitors, including three or four newcomers, were impressed with the high quality of inquiries received from interested companies, not only from the whole European area, but also from the United States, Australia, Africa, the Middle and Far East.

Amdea sponsored 25 British manufacturers of white goods, heaters, showers and a range of small electrical appliances. Similar to the UK components exhibitors, British DEA firms reported that their participation had on the whole been very successful, and in some cases beyond expectations.

Fred Stanley of Cumberland Fashions (Tick-A-Tee) and Lady Henderson the wife of the British ambassador in Paris, at the Paris Salon International de la Mode Enfantine.

Overseas trade export successes

Dunlop provides Abu Dhabi with fenders

Dunlop oil and marine division has won a £200,000 order for solid rubber fenders from Howard Algeemi Construction for the new £370 million port at Mina Zayed, Abu Dhabi.

Relieving congestion

The fenders will help protect shipping at the new port, which is being built to relieve congestion of the old dock area where vessels have been waiting weeks to discharge their cargos. Also included in the Dunlop order is fixing and ancilliary equipment for the fenders.

Berthing facilities

Deep-water berthing facilities for 34 ships will be available at the new port and there will also be five 1150 m deep-water inner berths. The area is due for completion in October 1978.

The division has also won an order with Iiapco, the Indonesian petroleum company, for six low pressure pneumatic fenders for ship-to-ship fendering.

One of Dunlop's low pressure pneumatic fenders.

In the Dunlop solid range hollow cylindrical fenders, which can be mounted either on jetty walls or vessels, are offered in sizes from 70 mm outside diameter to 1500 mm outside diameter. Rectangular, square, hollow oval fenders and 'D' profile fenders are also available. Dunlop 'V' profile and 'Pi' profile fenders have been specially developed in the same range for use in harbours with medium and large vessels.

Three types of mechanical fenders are marketed by the division. The Pemm range, Bifenders and Trifenders are all suitable for harbours which receive very large vessels. Low and high-pressure pneumatic fenders with low reaction loads and high energy absorption per unit area are available, mainly for ship-to-ship operations.

Further information: circle 433

Danish Army orders Land-Rovers

Leyland International has won a contract to supply 1000 Land-Rovers to the Danish army. The contract, secured through Leylands' Danish distributors, Dansk Oversoisk Motor Industry AS (DOMI), is for diesel-engined military half-ton and 88 inch wheelbase vehicles which will be built to specifications agreed with the Danish military authorities. The contract, together with spares, is valued at several million pounds and deliveries will extend over a number of years.

Denmark is the sixth Nato army to opt for the Land-Rover, others already being in service in Britain, Belgium, Holland, Luxembourg and Norway. For the Dutch army alone, nearly 4000 Land-Rovers have been ordered in the past two years.

Further information: circle 434

Taylor Woodrow wins Nigerian work worth £13m

Contracts valued at £13 million have been awarded to the mechanical, electrical and process division of Taylor Woodrow Construction Ltd, and its associated company in Nigeria, Taymech Nigeria Ltd.

With design and equipment procurement being carried out by the UK company, Taymech Nigeria will install automatic tanker loading facilities on the new oil-loading jetty at Okrika, near Port Harcourt, Nigeria, commissioned by the Nigerian Petroleum Refining Company.

Taymech Nigeria, has been appointed as the mechanical and electrical installation contractor to the Benue Cement Company, for its new cement works at Gboko, Benue State, Nigeria.

The UK-based division has been appointed to design, procure and supervise the erection of the mechanical and electrical services for the new textile mill, ordered by the Comite Departmental de Obras Publicas in Santa Cruz, Bolivia.

Further information: circle 435

North Sea contracts worth £15m awarded

Rolls-Royce RB 211 engine, the –24, has been chosen by North Sea Operators, Amoco (UK) Exploration and Shell (UK) Exploration and Production, to power a series of eight new gas turbine compressor packages ordered from Cooper-Bessemer for offshore operation.

Total value of the contract is over £15 million with Rolls-Royce receiving approximately £6 million for the eight 30 000 horsepower RB 211 units.

The RB 211's will be used for natural gas compression duty in the Leman and Indefatigable fields, 50 miles off the English east coast. They will help maintain the flow of natural gas to the shore terminal at Bacton for onward distribution by the British Gas Corporation through its network.

The order is the first for the higher powered version of the Industrial RB 211, following successful sales of the 26 400 horsepower –22 to pipeline operators in north America, Holland and to the British Gas Corporation. Development of the new, high efficiency 'fuel saver' unit has run in parallel with its aero counterpart, (RB 211-524), the first of which are now powering the long range versions of the Boeing 747 and TriStar airlines.

The four packages for Amoco (UK) Exploration have been chosen to operate on a single gas production platform in the Indefatigable field. These will supply over 130 000 horsepower for gas gathering and transmission duty after installation in 1979.

All eight RB 211 compressor packages are to be manufactured by Cooper-Bessemer UK Ltd, at its Bootle plant, Liverpool, with the engines being supplied by the industrial and marine division of Rolls-Royce at Ansty, Coventry.

Both Rolls-Royce and Cooper-Bessemer are major suppliers of gas turbine equipment to the oil and gas industry having individually or jointly sold plant to operators in 16 countries.

Further information: circle 436

Permali wins $4.25m Nasa contract

Permali Inc has secured a major export contract with Nasa (National Aeronautics and Space Administration), to manufacture wind-tunnel fan blades.

This work is part of a multi-million dollar modification to the largest wind-tunnel facility in the western world. The planned modifications to the Ames research centre 12 m by 24 m wind-tunnel includes the addition of a new 24 m by 36 m test section and an increase

in power from 36 000 to 135 000 horsepower, with an associated increase in speed from 230 mph to 345 mph.

Permali Gloucester has sole responsibility for the design, production and testing of 90 blades each 3 m long which will be assembled by Nasa into six 12 m fans.

The improved performance of the modified tunnel will enhance Ames' capabilities for research and development of new aircraft types, especially large helicopters and vertical and short take-off and landing aircraft.

As world experts in this field, Permali has also recently completed a large fan assembly for General Motors USA research facility.

Further information: circle 437

GEC Electrical Projects wins £7m order

GEC Electrical Projects Ltd has won an order worth nearly £7 million covering the supply of the complete drive systems for a computerised semi-continuous billet mill to be built by Davy Loewy of Sheffield for Acominas Steel Works at Ouro Branco, Minas Gerais, Brazil.

This order covers approximately 700 motors of various sizes up to 2600 kW, together with all associated control and thyristor converter equipment. The installation will employ advanced technology; a hierarchy of three GEC 4070 and one GEC 2050 computers and 17 micro processor systems will provide co-ordinated control for the whole of the bloom and billet mill complex.

GEC Electrical Projects' responsibilities extend to the complete electrical supplies for the semi-continuous billet mill complex and in addition to the above include a further Cr$ 125,000,000 of Brazilian manufactured equipment. The UK supplied equipment will be manufactured at GEC factories in Rugby, Kidsgrove, Bradford, Leicester, Boreham-wood, Birmingham and Broadstairs.

Further information: circle 438

Water storage tank for Dubai

Lilley International, the London-based subsidiary of F. J. C. Lilley, of Glasgow, has won a £4 million order from Dubai Water Supply for the construction of a 12 000 000 gallon circular water storage tank and ancillary works.

Further information: circle 439

Coconut-oil extraction plants for Philippines

Two coconut-oil extraction plants, together worth nearly £3 million, are about to be commissioned in the Philippines by Simon-Rosedowns Ltd (Simon Food Engineering Group) which designs and equips plant for the processing of vegetable oils and fats.

One contract, for Iligan Coconut Industries Inc, is for a complete coconut-oil extraction complex to process 300 tons of copra per 24 hours. This plant is being installed at Iligan City and comprises preparation, pre-pressing, extraction by the solvent process, and oil filtration plant.

After the copra is broken into small pieces in the preparation plant it is fed to three Simon-Rosedowns 'E' type pre-presses which reduce the initial oil content of the copra and produce a presscake containing approximately 18 per cent oil. The pre-pressed cake is then passed to the extraction plant where the remaining oil is removed to leave a meal containing less than 1 per cent oil.

The second contract, for Mindanao Coconut Oil Mill Inc, is also a coconut-oil extraction plant. It is based upon the expeller process wherein two Simon-Rosedowns 'E' type high-pressure screw presses process 100 tons of copra per 24 hours. Preparation and oil filtration is also included in this plant which is being built at Karamotan.

Crude oil storage, steam-raising plant, and workshop equipment are some of the ancillary equipment supplied for both contracts. Pelleting presses were provided by the Simon-Rosedowns associate company Simon-Barron Ltd.

Further information: circle 440

Bulldozers exported to Pakistan

Aveling Marshall, the Lincolnshire firm, has completed a £3¼ million export order right on schedule.

The final 16 of 160 bulldozers for the Pakistan government have now left Liverpool on the 25-day passage to Karachi.

The contract for the Aveling Marshall earthmovers – the biggest-ever order in the 130-year history of the Gainsborough firm – was signed last May, with a firm assurance that all 160 machines would be delivered early in 1978.

Already, 144 of the bulldozers – to be used on a five-year land clearance project in the southerly Pakistan province of Sind – have arrived on site and will be joined by the last 16 in the next few weeks.

Further information: circle 441

Italian transmitter and camera contracts for Pye

Pye TVT Ltd of Cambridge will supply the Italian State Broadcasting Network, RAI, with television transmitters and outside broadcast cameras in a contract worth over £3 million.

The camera re-equipment contract is for 18 LDK 5 outside broadcast cameras. They will be used for future outside broadcast work in Italy and replace existing Philips LDK 3 equipment.

Installed in two and three-camera mobile units based in regional centres throughout Italy, the fleet of vehicles can operate separately for individual assignments or be linked to provide extensive coverage of larger events.

Events requiring cable runs to remote camera locations of up to 2000 m can be achieved with this camera, thus greatly increasing the scope of outside events. The second part of the camera contract is for eight LDK 11 cameras.

The ENG (electronic news gathering) cameras will be installed in single-camera estate cars, regionally based to provide national news coverage.

The transmitters ordered all include the new Pye TVT comprehensive drive system and comprise six 1 kW Band III, three 2 kW UHF and six 40/25 kW UHF units. These new transmitters will form part of the expansion and replacement programme of RAI.

Further information: circle 442

Koreans train at Arbroath

Undergoing seven weeks' intensive training at Giddings and Lewis-Fraser Ltd's Arbroath plant are 10 Koreans employed by the giant Hyundai Shipbuilding and Heavy Industry Company. Their training is part of a £1.62 million contract under which G & L Fraser is supplying some of its most advanced machine tools and controls to Hyundai's marine diesel engine plant at Ulsan, Republic of Korea.

The visitors, all departmental managers, are following courses specially devised to cover the function of the latest-model production horizontal machines, maintenance procedures and programming of the associated computerised numerical control systems.

Their time is divided between 'classroom' instruction and working alongside G & L Fraser personnel on the shopfloor. Before they return to Korea, to pass on all they have learned, they will see the first of the machines destined for the Hyundai plant 'taking-shape' in the assembly shop at Arbroath.

Further information: circle 443

Electrical engineers light up Hong Kong railway

J. Smith (Brinksway) Ltd, the Cheshire firm of electrical engineers, has won a contract from GEC Hong Kong Ltd for an emergency lighting system for the mass transit railway being built there.

The light output required is greater than that of standard available systems. The equipment will be supplied in May 1978 and comprises 900 bulbs of 40 watt gear sets and 1300, 13 watt maintenance-free Bulkhead Luminaires. These are single point, self-contained fittings containing sealed nickel cadmium batteries automatic charging system.

The system has been designed to meet very exacting requirements for operation under conditions of high temperature and humidity.

Further information: circle 444

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Overseas trade country data

Australia

Textiles, clothing and footwear. A notice in *Trade and Industry*, 9 December 1977, reported on the measures taken by the Australian government to provide short-term assistance for these industries. That notice indicated that quota levels would be subject to half-yearly review and adjusted as necessary. In cases where the government decides to continue tariff quotas or import licensing into a subsequent period, individual quotas will be calculated on the basis of actual import performance during a period terminating as close as practicable to the announcement. This period of actual import performance is referred to as the moving base period.

The government has now announced that the following arrangements are being adopted for the application of the moving base to textiles, clothing and footwear quotas in the forthcoming quota period:

Specific arrangements – footwear, brassieres and certain textiles

It is the intention of the government that wherever possible seven months forward notice be given of individual entitlements. Because of this, the time is not available to establish new base period import performance and advise individual allocations of quota for footwear and brassieres for the quota period commencing 1 July 1978. It has been decided therefore to defer implementation of a moving base for these goods until the issue commencing 1 January 1979. Advice will be given as early as possible of the selected moving base for this quota issue. Because of the special circumstances associated with the selection of the original base periods for pile fabrics of man-made fibre and towelling, it has been decided to defer implementation of the moving base for these commodities for a further 12 months.

Quota establishment for period commencing 1 September 1978 – clothing and textiles

For clothing and textiles other than those specifically mentioned above, it has been decided to commence the moving base for global quotas for the quota period 1 September 1978 to 28 February 1979. Individual global quotas for each of the clothing and textile categories for this period and the period 1 March 1979 to 31 August 1979 will be established on the basis of each individual applicant's entries for home consumption of the subject goods in the relevant two-year or 18-months moving base period specified in the schedule at the end of this notice. All ministerial determinations will be issued with 12 months validity. The names of quota holders will be published every six months.

Category	Annual quota level (ceiling) for quota period commencing 1 Sep 1978	Moving base period
		(Two calendar years or 18 months, as indicated)
CLOTHING – GROUP 1		
1 Knitted coats, jumpers, cardigans and like garments (60.05.1)	13.3 million	1976-77 (two years)
2 Knitted outerwear shirts for men, boys and infants (60.05.1)	6.67 million	1976-77 (two years)
3 Knitted shirts and blouses for women or girls and woven shirts and blouses for women, girls and infants (60.04.5, 60.05.1, 61.02.4 now 61.02.3, 61.04.3)	9.0 million	1976-77 (two years)
4 Leather clothing (42.03.3)	0.06 million	1 Jul 1976-31 Dec 1977 (18 months)
5 Knitted or woven trousers and jeans for men, youths and boys (60.05.1, 61.01.6)	3.6 million	1976-77 (two years)
6 Knitted or woven suits for men, youths and boys (60.05.1, 61.01.2, 61.01.9)	0.077 million	1976-77 (two years)
7 Woven coats for men, youths and boys (61.01.4)	0.27 million	1976-77 (two years)
8 Knitted or woven shorts for men, youths and boys (60.05.1, 61.01.6)	1.5 million	1976-77 (two years)
9 Knitted tracksuits for adults (chest measurement 86 cm and above) (60.05.1)	0.45 million	1976-77 (two years)
10 Woven sleepwear for women, girls, and infants (61.04.2)	2.0 million	1976-77 (two years)
11 Woven pyjamas and other woven sleepwear for men and boys (61.03.2)	1.2 million	1976-77 (two years)
12 Garments made from PVC or unhardened rubber coated fabric (39.07, 40.13, 61.01, 61.02)	100% of imports 1976-77 (vfd)	1 Jul 1976-31 Dec 1977 (18 months)
13 Coats and jackets made from PVC film (39.07)	100% of imports 1976/77 (vfd)	1 Jul 1976-31 Dec 1977 (18 months)
CLOTHING – GROUP 2		
14 Certain outergarments for women, girls and infants (60.05.1, 61.02.3, 61.02.4, 61.02.5, 61.02.7, 61.02.9)	6.67 million	1976-77 (two years)
15 Swimwear (60.05.1, 61.01.8, 61.02.8)	0.83 million	1976-77 (two years)
16 Babies napkins (60.04.3, 61.04.1)	0.6 million	1976-77 (two years)
17 Knitted or woven dressing gowns, kimonos, bathgowns and the like (60.05.1, 61.02.6, 61.02.7)	0.23 million	1976-77 (two years)
18 Knitted children's tracksuits, playsuits and rompersuits under 86 cm (60.05.1)	5.1 million	1976-77 (two years)
19 Pilches (39.07)	5.0 million	1 Jul 1976-31 Dec 1977 (18 months)
20 Woven coats for women, girls and infants (61.02.2)	0.75 million	1976-77 (two years)
21 Knitted and woven dresses (60.05.1, 61.02.1, 61.02.9)	3.27 million	1976-77 (two years)
22 Woven and knitted undergarment shirts for men and boys (60.04.1, 61.03.1)	6.0 million	1976-77 (two years)
23 Woven outergarments shirts (61.01.9)	100% of imports 1976/77 (no.)	1 Jul 1976-31 Dec 1977 (18 months)
TEXTILES		
24 Woven man-made fibre fabrics (39.01.3, 39.02.3, 39.03.3, 50.09.3, 50.10.2, 51.04.9, 55.09.4, 56.07.9, 59.08.3)	35.0 million m^2	1976-77 (two years)
25 Knitted and crocheted man-made fibre fabrics (60.01.92)	2.8 million kg	1976-77 (two years)
26 Terry towels (62.02.6)	2.54 million m^2	1976-77 (two years)
27 Knitted net fabrics (60.01.91, 60.01.99 and 60.01.93)	$2.3 million	1 Jul 1976-31 Dec 1977 (18 months)
28 Sleeping bags (under $30 vfd each) (94.04.2, 94.04.9)	300 000 units	1 Jul 1976-31 Dec 1977 (18 months)
29 Acrylic yarn (56.05.31)	0.93 million kg	1976-77 (two years)
30 Polyamide and polyester yarns (other than carpet yarn) (51.01.4, 51.01.5)	2.8 million kg	1976-77 (two years)
31 Cotton sheeting (55.09.5)	20.0 million m^2	1976-77 (two years)
32 Bed linen (62.02.1)	$1.0 million vfd	1976-77 (two years)
33 Knitted and woven curtains (60.05.6, 60.05.3, 62.02.7 and 60.05.9)	3.8 million m^2	1 Jul 1976-31 Dec 1977 (18 months)

Inquiries: OTAR 01-248 5757 ext. 401/468 or CRE 01-215 5319.

Ref: CRE 1459/77

Austria

Alcoholic beverages: spirits. New regulations came into force on 9 December 1977 stating that the content of alcohol in whisky must not be less than 40 per cent and of vodka not less than 38 per cent.

Inquiries: OTAR 01-248 5757 ext. 459.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Changes in VAT. From 1 January the VAT rates for certain luxury goods have been increased to 30 per cent.

Goods within the following CCCN headings are affected:

33.06, 37.02, 43.01, 43.02, 43.03, 58.01, 58.03, 69.13, 71.01, 71.02, 71.03, 71.12, 71.13, 71.15, 84.06, 85.14, 85.15, 85.20, 87.02, 87.09, 87.14, 88.02, 89.01, 90.02, 90.07, 90.08, 90.09, 91.01, 92.07, 92.11

Inquiries: OTAR 01-248 5757 ext. 458/461.

Canada

Saccharin in drugs, cosmetics and sweeteners. In information letter 518, the Canadian Assistant Deputy Minister of Health and Welfare, announced proposed regulations to restrict the use of saccharin in drugs, cosmetics and table-top sweeteners. Copies of the letter are available.

Inquiries: OTAR 01-248 5757 ext. 455/456/457.

France

Motorcycle crash helmets. An order of the Ministry of Industry, Trade and Crafts, dated 13 February 1978, published in the *Official Journal* of 17 February 1978, renders compulsory compliance with French standard NF S 72-302 for motorcycle crash helmets (CCCN 65.06) imported into France.

Copies of standard NF S 72-302 can be obtained from British Standards Institution, Sales Department, Nowton House, 101 Pentonville Road, London N1.

Copies of the French text of the order are available.

Inquiries: OTAR 01-248 5757 ext. 4230.

Iceland

Special goods tax. The Icelandic government has passed a number of economic measures following devaluation of the krona on 8 February. That of most interest to exporters is a reduction in the special goods tax, which is levied on a wide range of goods, from 18 per cent to 16 per cent from 15 February until the end of 1978. The list of goods affected remains unchanged. The other measures are internal measures on which no further information is available.

Inquiries: OTAR 01-248 5757 ext. 460.

India

Liquor (regulation of production, supply and distribution). Bill 108 of 1977 has been introduced in Lok Sabha (the lower house) and concerns certain restrictions in relation to trade and commerce in, and production, supply and distribution of, alcoholic liquor.

The main point of the proposed legislation concerning imports is that all packages of liquor and any form of advertisement would need to contain a 'specified warning' in the following terms:
Consumption of liquor is injurious to health. (Liquor does not include mixtures and liquids used as medicines or in the preparation of medicines.)

Copies of the bill are available.

Inquiries: OTAR 01-248 5757 ext. 420/475/7062.

Israel

Import duty amendments. The following import duty amendments have been announced:

CCCN/Description	New import duty rate for UK goods
ex 10.06 Rice released before 1 April 1978, other than rough rice (including paddy, loonzain and cargo rice)	8%
ex 24.02 Cigarettes:	
released before 1 April 1978	5%
other	12%
ex 39.02 Polyvinyl chloride resin in the form of powder, granules, flakes, lumps or liquid	28.5%
56.03 Waste (including yarn waste and pulled or garnetted rags) of man-made fibres (continuous or discontinuous), not carded, combed or otherwise prepared for spinning	Exempt

Inquiries: OTAR 01-248 5757 ext. 458/461.

Revocation of cigarette excise tax. The Israeli authorities have revoked the excise tax on cigarettes.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Republic of (South) Korea

Industrial property. The Patents, Etc (Republic of Korea) (Convention) Order 1978 entered into force on 19 February 1978. This order was made with a view to the fulfilment of an arrangement with the Republic of Korea and declares that republic to be a convention country for all purposes of the acts relating to patents and designs. Copies of the order SI 1978/187 are available, price 10p (plus postage), from Sales Branch, The Patent Office, St Mary Cray, Kent; Sale Counter, The Patent Office, 25 Southampton Buildings, London WC2A 1AY, and any branch of HMSO.

Kuwait

Labelling of foodstuffs. *Trade and Industry* of 22 July 1977 and 17 January 1978, respectively, gave details of article 6 of an Amiri decree which required the labelling in Arabic of canned, bottled or prepacked foodstuffs and of an extension to 31 January 1978, of the grace period for its implementation.

Information has now been received that an unofficial extension of the grace period has been granted as from 1 February 1978.

As soon as further details are available another notice will be issued.

Inquiries: OTAR 01-248 5757 ext. 475/7062.

Libya

Import duty concessions. Duty exemptions which may be claimed by certain Libyan importers for machinery plant and spares etc. and primary materials.

Steel pipe production – a wider range of primary materials has now been named.

Additional industries are now included.

Plastic bag making
Textile spinning and dyeing
Wet battery production
Wool washing and dyeing
Tile production

Inquiries: OTAR 01-248 5757 ext. 462.

In *Trade and Industry*, 17 February, car production was among the industries included under import duty concessions. This should be deleted.

Mexico

Trade Mark Law: 1976. On 6 February 1978, a decree was published in the *Diario Oficial* granting a 12-month extension on the time limit for registering dual trade marks in Mexico. The new deadline therefore becomes 10 February 1979.

A new, unofficial, translation of the regulations to the law of inventions and trade marks in matters relating to the transfer of technology and association of trade marks, has just been received and is available for public inspection, along with a short commentary, at the Chancery House Annexe, Science Reference Library (Holborn Division), Chancery House, Lower Ground Floor, Chancery Lane, London WC2A 1AY.

Paraguay

Amendments to import duties. The Paraguayan government have passed decree, 35683 of 19 December 1977 which came into force on 2 January 1978 and converts previous specific customs tax to ad valorem rates. The goods affected fall within the following chapters of the tariff:

Chapters 1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 27, 28, 29, 30, 32, 33, 34, 35, 36, 37, 38, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 64, 65, 66, 67, 68, 69, 70, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 85, 87, 90, 92, 93, 94, 95, 96, 97, 98 and 99

Inquiries from British exporters about this notice should quote the tariff number or specify the product in which they are interested.

Inquiries: OTAR 01-248 5757 ext. 474/476.

CRE Commercial Relations and Exports Divisions
Tel. Direct dialling (see end of each notice)

OTAR Overseas Tariffs and Regulations Section
Tel. 01-248 5757 (extension at end of each notice)

South Africa

Customs tariff application. Customs tariff application list no. 5/78, published in the South African *Government Gazette* of 24 February 1978 contains an application to the Board of Trade and Industries for increase in duty on the undermentioned equipment imported with or incorporating electric motors, single or three phase from 0.3 kw to 260 kw, with not more than eight poles.

Tariff subheading	Description
ex 84.10.40.90	reciprocating pumps
ex 84.10.50.90	centifugal pumps (including turbo pumps)
ex 84.10.60.90	rotary pumps
ex 84.10.80.90	pumps for liquids
ex 84.11.10.90	air compressors
ex 84.11.60.90	ventilating fans
ex 84.11.70.40 / ex 84.11.70.90	fans, blowers and the like (excluding ventilating fans)
ex 84.45.10.10	automatic lathes
ex 84.45.10.20	capstan (or turret) lathes
ex 84.45.12	planing machines
ex 84.45.13	shaping machines
ex 84.45.14	slotting machines
ex 84.45.15	broaching machines
ex 84.45.10.10	jig boring machines
ex 84.45.27.90	milling machines
ex 84.45.29.20	single-spindle vertical drilling machines
ex 84.45.29.50	multi-spindle vertical drilling machines
ex 84.45.30.10	radial drilling machines
ex 84.45.31	sawing machines (including friction or abrasive cutting-off machines
ex 84.46.10	portable or mobile machine tools for working stone, ceramics, concrete, asbestos cement and like mineral materials or for working glass in the cold
ex 84.47.10	fret saws
ex 84.47.80	portable or mobile machine tools for working wood, cork, bone, ebonite (vulcanite), hard plastic materials or other hard carving materials
ex 84.47.90	other machine tools
ex 84.59.25	vacuum cleaners, electrical, non domestic

This application supercedes an application covering these headings published in *Trade and Industry* on 27 January 1978.

Those British trade organisations thought to be interested in the application are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

Inquiries: CRE 01-215 5274.

Pesticide residues in foodstuffs. R.226 published in South African *Governemnt Gazette*, 5879, details maximum limits for pesticide residues in foodstuffs.

Inquiries: OTAR 01-248 5757 ext. 471.

Customs tariff changes. The following amendments were published in the *South African Gazette* of 3 February 1978.

R.182 CCCN 64.02. The effect of this notice is that the rates of duty on shoes with outer soles of rubber and uppers of textile material, of a kind commonly worn by tennis players or gymnasts, are amended.

Import surcharge

R.183 Item 172.00: CCCN 64. The following subheadings have been added to the list of exclusions: 64.02.30.60, 64.02.40.50 and 64.02.40.60.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

CRE tel. Direct dialling

OTAR telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Thailand

Fishing nets. The Thai Board of Investment has issued notice, 3/2521, whereby a special fee of 30 per cent of the cif price is placed on the import of fishing nets made of synthetic yarns of the polyamides type, as is generally called nylon, mainly in the size of 110 denier, and fishing nets made of yarns of monofilament of mostly nylon, coming under tariff heading CCCN 59.05.

The Board of Investment shall determine which imports pay the special fee and inform the customs department accordingly.

This notice came into effect on 1 February 1978 and remains in force until 31 January 1979.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Steel wire. The Thai Board of Investment has issued notice, 2/2521, whereby a special fee of 20 per cent of the cif price is placed on the import of steel wire for prestressed concrete, with high carbon, cold rolled, uncoated or unplated, having cross section in circular shape with diameter of 2 to 8 mm coming under tariff heading CCCN 73-15 g (2).

The Board of Investment shall determine which imports pay the special fee and inform the customs department accordingly.

This notice came into effect on 1 February 1978 and remains in force until 31 January 1979.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

United States

Investigation of EEC/Japan steel agreement. The office of the special trade representative has announced the president's rejection of the American Iron and Steel Institute section 301 complaint alleging substantial diversion of Japanese steel exports to the United States as a result of the Japanese/EEC agreement. The STR said that although it was clear that a bilateral understanding had been reached, there was not sufficient evidence that the agreement had caused a significant diversion of steel to the United States.

Inquiries: CRE 01-215 5629.

Import of speciality steels under quota. Import statistics in pounds weight for the following products with quotas still open as at 17 February 1978:

Sheets and strips of stainless steel (item 923.20)	32 600 000 (quota now filled)
Plates of stainless steel (item 923.21)	4 581 235
Bars of stainless steel (item 923.22)	Quota filled

Inquiries: CRE 01-215 5629.

Citizens band transceivers. The United States International Trade Commission reported to the president on 3 February that citizens band transceivers, provided for in item 685.25 of the tariff schedules of the United States (TSUS), are being imported into the United States in such quantities as to cause serious injury to the domestic industry producing similar articles. The commission split on whether to remedy by adjustment assistance or increased tariffs. The president has 60 days in which to take a decision.

Inquiries: CRE 01-215 5629.

Uruguay

Agricultural machinery and tractors. Decree 39 of 25 January 1978 extends the concessions granted by decree 924 of 21 November 1974. This decree exempts agricultural machinery and tractors from the payment of consular charges and port charges from 1 January 1978. A copy of the decree is available in Spanish.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Concessions to various industries extended. Decree 27/978 of 18 January 1978, extends until 31 December 1978, the exemptions from surcharges, dues and taxes on imports of machinery and equipment for use by the following industries. Leather footwear; woven fabrics and made-up goods of wool; marble and granite; tanning; leather clothing; fancy leathergoods; heels of leather and wood, and lasts for footwear.

Inquiries: OTAR 01-248 5757 ext. 474/476.

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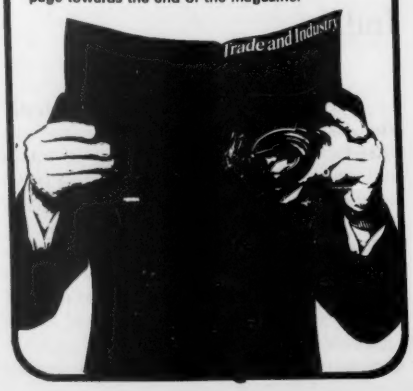

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			*of which*					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers	Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1976	1970	£ million	£ million			£ million 18,401	10,528	1,830	1,929	£ million		
1970	100.0	31,696	9,453	2,130	1,799	444	325	68	−16	695	−25	720
1971	101.8	32,675	9,682	1,991	1,930	92	−148	52	18	1,057	279	778
1972	104.2	34,542	9,797	1,739	2,071	34	−145	48	15	107	−701	808
1973	110.4	36,062	10,253	1,753	2,414	1,321	597	102	379	−910	−2,354	1,444
1974	109.5	35,361	10,287	2,028	2,414	596	634	81	−109	−3,538	−5,195	1,657
1975	107.9	35,257	10,062	1,745	2,034	−743	−429	−111	−65	−1,649	−3,205	1,556
1976	110.1	35,405	9,724	1,659	1,974	66	5	23	9	−1,166	−3,510	2,344
1977		35,147		1,761	2,075		137 p	107 p	17 p	109	−1,607	1,716
1976 1st qtr.	110.2	8,829	2,489	405	471	44	0	26	33	−70	−543	473
2nd qtr.	109.6	8,797	2,425	407	489	−57	−66	−20	−45	−352	−909	557
3rd qtr.	109.8	8,880	2,435	421	506	−1	−2	14	16	−399	−1,097	698
4th qtr.	110.8	8,899	2,375	426	508	80	73	3	5	−345	−961	616
1977 1st qtr.	109.8	8,761	2,248	420	507	155	125	51	102	−535	−949	414
2nd qtr.	110.0	8,665	2,231	432	509	236	164	39	−5	−351	−769	418
3rd qtr.	109.9	8,796	2,262	454	527	−81	−31	5	−44	495	−46	449
4th qtr.		8,925 pe		454 p	531 p		−21 p	12 p	−36 p	500	65	435 e
% change last 2 qtrs. on prev. 2 qtrs.	−0.3	+1.7	−2.8	+6.6	+4.1							
on a year earlier	+0.2	−0.3	−7.6	+7.1	+4.3							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)				Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults		Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count		On a balance of payments basis	
	at 1970 prices		at 1971 prices		(not seasonally adjusted)				(old series)					at 1975 prices	
Base of index £m in base year Series in	1970	1970	1971 16,296	thousands	Jan. 1974		1970	1970	Jan. 1970	thousands		thousands		1975 19,462	1975 22,667
1971	100.3	99.4	100.0	108.5	80.0	9.4	104.6	109.0	119.4	775.8	3.4	130.9		84.6	83.3
1972	102.5	102.0	105.3	138.6	85.7	7.1	109.2	114.8	134.8	854.9	3.7	147.3		84.5	92.4
1973	109.9	110.5	110.3	137.1	93.5	9.1	144.5	123.2	152.6	611.0	2.6	307.0		96.8	105.6
1974	106.9	108.9	109.0	102.8	108.5	16.0	215.3	152.0	179.6	599.7[1]	2.6[1]	302.7[1]		103.9	107.9
1975	101.5	102.2	106.7	97.2	134.8	24.2	235.4	188.7	227.6	929.0	3.9	150.0[1]		100.0	100.0
1976	102.0	103.1	106.5	104.7	157.1	16.5	299.0	219.6	263.3	1,269.8[1]	5.4[1]	120.4[1]		109.9	105.5
1977	102.3	103.6	103.8	107.1	182.0	15.8	340.1 p	261.7 p	288.5	1,378.1	5.8	155.6[1]		118.9	107.0
1977 1st qtr.	103.3	105.3	103.2	104	174.1	16.5	341.5	248.0	280.2	1,329.5	5.6	..		115.7	109.1
2nd qtr.	102.0	102.9	102.6	103	181.9	17.4	347.7	259.2	285.2	1,340.6	5.6	157.7		117.9	109.8
3rd qtr.	102.5	103.6	104.6	112	184.7	16.5	340.5	267.7	288.4	1,414.6	5.9	151.9		124.2	106.4
4th qtr	101.5 p	102.5 p	104.9	110	187.4	13.1	330.8 p	272.1 p	300.3 p	1,427.8	6.0	160.1		117.9	102.7
1977 Feb.	103.2	105.3	104.0	113	174.1	16.2	339.5	248.2	278.7	1,330.0	5.6	148.8		115.2	103.4
Mar.	103.3	105.5	101.7	104	175.8	16.7	347.2	250.8	283.8	1,328.5	5.6	154.0		116.5	107.0
Apr.	102.4	103.5	102.3	106	180.3	17.5	349.7	255.4	283.1	1,333.8	5.6	155.5		116.1	105.3
May	103.6	105.1	103.2	108	181.7	17.1	348.3	259.8	286.2	1,323.8	5.5	159.4		115.9	109.6
June	100.1	100.1	102.3	95	183.6	17.7	345.2	262.4	286.2	1,364.3	5.7	158.1		121.8	114.5
July	102.6	104.2	105.0	113	183.8	17.6	344.5	265.8	286.5	1,398.5	5.9	155.2		123.2	110.4
Aug.	102.6	103.3	105.2	116	184.7	16.5	338.8	268.1	288.7	1,410.3	5.9	153.4		123.4	101.3
Sept.	102.4	103.3	103.9	107	185.7	15.6	338.1	269.2	290.1	1,434.9	6.0	147.2		125.9	107.5
Oct.	101.1	102.2	103.3	116	186.5	14.1	333.8	271.0	294.6	1,431.5	6.0	156.0		119.6	101.4
Nov.	101.3	101.9	103.8	108	187.4	13.0	329.9	272.0	300.1	1,429.6	6.0	159.4		115.2	98.5
Dec.	102.1 p	103.3 p	107.0	104	188.4	12.1	328.7 p	273.3 p	306.1 p	1,422.3	6.0	165 0		118.9	108.1
1978 Jan.			106p	125	189.5	9.9	326.4 p	276.9 p		1,419.2	5.9	180.3		112.7 p	114.4 p
Feb.										1,409.0 p	5.9	187.0 p			
% change latest 3 months on prev. 3 months	−0.9	−1.1	+1.5	−0.6	+1.5		−2.5	+1.7	+4.1	−1.1				−6	+3¼
on a year earlier	−1.4	−1.9	+0.3	+3.7	+11.7		−1.5	+14.7	+10.1	+6.8				+1¼	−3

p Provisional pe Preliminary estimate e Estimate .. Not available [1] Average of available months

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Economic indicators of the industrial countries: quarterly analysis

A strengthening of industrial activity in the OECD countries at the end of 1976 and early 1977 was only temporary. Having risen in the first quarter, industrial production remained static through the remainder of 1977. Industrial output in the United States grew at a progressively slower rate during the year, it remained flat in Japan and showed very little change in the EEC as a whole after a fall in the second quarter.

The growth in the value of world trade weakened in the first half of last year. Exports having expanded by 10½ per cent in the second half of 1976, increased by 6 per cent in the first six months of 1977. Imports, which had shown a 12 per cent rise in the latter half of 1976, rose by about 5½ per cent. The deceleration was common to the trade of both industrial and primary producing countries. Figures for the third quarter of 1977 for the industrial countries only indicate similar trade growth to that of the previous quarter with exports rising by under 2½ per cent and imports by under 1½ per cent. In volume terms exports increased by ½ per cent and imports showed no change in the third quarter compared with the second.

The unemployment position worsened in many of the industrial countries during 1977. However, among the major countries the United States showed some improvement on the December 1976 total. The increase in consumer prices in the OECD area as a whole has moderated since last spring. This development reflected the fall in non-oil commodity prices and the end of the severe winter in North America. Exchange rate changes and the success of countries with above-average inflation rates in containing wage increases have also contributed to the deceleration in consumer prices, the increase in which in the

The tables have been prepared for the convenience of users who do not have access to the sources themselves. International publications (as indicated) have been used, supplemented, where available, by later reports, denoted – (e). The form of presentation adopted – indicators by subject – is for convenience only, and it must not be assumed that the indicators in the same table for different countries are strictly comparable. An attempt has been made to indicate major differences of definition, but the coverage and methods of collection vary considerably; this is partly due to different administrative procedures in various countries. Fuller details may be obtained from the sources indicated, and from the national publications of the countries concerned. Exchange rates are those used in the basic data sources. The group of industrial countries is taken as comprising the members of the Organisation for Economic Co-operation and Development (OECD) ie: western Europe, North America, Japan, Australia and New Zealand. Consumer prices apart, New Zealand is excluded from OECD totals in that insufficient information is available.

This article is the quarterly variation of the monthly series, supplementing the usual tables with those showing: gross domestic production, earnings/wages, world and industrial countries trade, balance of payments, import and export volume and exports of manufactures.

Table 1 Industrial production (excluding construction) seasonally adjusted

Indices 1970 = 100

	Belgium	Luxembourg	France	F.R. of Germany	Ireland	Italy	Netherlands	United Kingdom r	EEC[1]	Canada	United States	Japan	OECD
Weights in total	1.3	0.1	7.1	12.5	0.2	4.5	1.5	6.3	33.5	3.5	43.2	11.6	
1971	103	98.7	104	101.8	105	99.9	106	99.8	102	105.6	102.0	102.3	101
1972	109	102.8	112	105.7	109	104.4	111	102.1	106	113.0	111.0	110.2	108
1973	116	115.1	120	112.9	120	114.5	119	110.5	115	123.5	120.4	127.4	119
1974	120	119.1	123	111.3	122	119.0	125	108.5	115	127.4	119.9	123.5	119
1975	109	93.0	114	105.0	114	108.5	119	103.1	108	121.3	109.3	110.4	109
1976	118	88.8	124	112.7	125	121.1	126	104.3	115	127.4	120.4	125.4	119
1977								105.7			127.2 e		
1975 1st quarter	111	101.4	113	104	115	110.2	118	107.8	108	121.3	105.0	106.5	108
2nd	107	92.3	113	104	113	107.0	117	102.3	106	120.7	106.0	109.8	108
3rd	106	83.2	112	104	114	105.9	115	111.1	106	120.8	111.8	112.2	111
4th	110	94.2	117	108	116	110.8	123	102.3	110	122.3	114.4	112.9	114
1976 1st quarter	114	97.5	122	111	122	116.6	124	102.7	113	125.7	118.1	119.8	117
2nd	119	103.7	123	113	123	120.7	126	104.4	115	128.0	120.0	125.0	120
3rd	118	96.6	125	114	126	122.7	127	104.2	116	127.5	121.4	127.0	121
4th	119	97.7	125	115	127	127.9	129	105.8	118	128.4	122.0	129.3	122
1977 1st quarter	121	100.1	129	117	131	131.4	127	107.2	120	131.1	123.9	130.1	124
2nd	121	103.4	125	116	134	122.2	128	105.4	118	131.6	127.1	131.1	125
3rd	113	94.4	125	116	134	120.2	125	105.8	117	131.5	128.4	130.0	125
4th								104.4			129.4 e		
1976 January	112	96.4	120	111		112.0	123	101.7	112	124.6	116.6	116.5	115
February	114	98.4	120	112		118.8	123	103.2	114	125.8	118.1	119.0	117
March	117	97.7	122	110		119.0	125	103.2	114	126.6	118.8	122.7	118
April	120	100.6	122	112		118.6	127	104.0	115	127.5	119.1	125.9	119
May	119	108.0	122	111		124.1	123	106.0	115	127.5	120.2	123.4	120
June	121	102.6	123	113		119.5	127	103.2	115	127.2	120.7	125.7	120
July	114	94.1	124	111		122.7	124	104.2	115	126.7	121.2	127.3	120
August	121	86.5	124	113		118.9	126	103.5	115	128.2	121.8	126.7	120
September	120	109.1	129	115		126.4	129	104.8	118	127.5	121.3	127.1	122
October	122	101.6	123	115		122.8	128	105.3	117	127.2	121.0	127.3	121
November	119	96.5	129	115		128.6	127	106.0	119	128.6	122.0	130.4	123
December	121	95.2	125	116		132.3	131	106.2	119	129.4	123.4	130.3	123
1977 January	121	101.6	129	117		131.4	129	107.3	121	131.6	122.7	130.7	124
February	119	96.7	127	116		131.3	126	107.0	119	130.8	123.6	128.4	123
March	122	102.0	129	118		131.6	127	107.2	120	131.1	125.5	131.2	125
April	119	100.0	125	116		123.2	133	105.9	118	130.8	126.3	132.3	124
May	121	105.6	123	115		125.9	127	107.3	118	131.5	127.1	129.6	125
June	122	104.5	128	116		117.4	125	103.2	117	132.5	127.8	131.4	125
July	105	97.9	124	115		118.5	125	106.0	116	131.1	128.7	128.8	124
August	119	84.7	124	116		119.1	125	105.9	117	131.7	128.1	130.3	125
September	115	100.7	125	117		123.0	126	105.7	118	131.6	128.6	130.9	125
October	113	94.4	123	117		117.7	126	104.0	116	131.6	128.9	130.4	125
November	112 e	100.6 e	127 e	117 e		119.9 e	125 e	104.1	117 e	132.4 e	129.6	133.5 e	126
December								105.1			129.6 e		
% change latest three months													
On previous three months	−1.7	3.0	−0.3	1.2	—	1.6	0.5	−1.4	0.3	0.1	0.7	1.1	0.5
On a year earlier	−5.8	−3.7	−1.6	1.7	6.3	−4.6	−1.8	−1.4	−0.8	3.2	5.9	2.6	2.7

[1] Excluding Denmark. r Revised.

Source: United Kingdom, Department of Trade; all others 'OECD MEI'.

Table 2 **Gross domestic production** seasonally adjusted

Indices 1970 = 100

	Canada	United States [1]	Japan [1]	Italy	France [2]	FR of Germany [1 3]	United Kingdom
1971	106	103	107	101	105	103	102
1972	113	109	117	105	111	107	104
1973	122	115	128	112	118	112	110
1974	126	113	127	116	120	113	110
1975	128	112	130	112	120	110	108
1976	134	119	138	119	127	116	110
1973 1st quarter	120	114	126	107	116	112	110
2nd	121	114	129	111	117	112	111
3rd	122	115	129	114	118	112	111
4th	125	116	129	116	120	113	110
1974 1st quarter	127	114	125	118	122	114	106
2nd	127	114	126	118	122	114	110
3rd	126	113	127	116	123	113	112
4th	126	112	128	113	119	111	110
1975 1st quarter	126	109	128	113	117	109	109
2nd	127	110	129	111	119	109	108
3rd	129	114	130	111	118	110	107
4th	129	114	132	114	121	112	107
1976 1st quarter	133	117	136	117	125	115	110
2nd	135	118	137	118	127	116	110
3rd	134	119	138	119	127	116	110
4th	134	120	139	121	128	118	111
1977 1st quarter	136	122	143	122 e	130	119	110
2nd	136	124	144	119 e	129 e	119	110
3rd	138 e	125 e	145 e	118 e	129 e	119 e	110
% change latest quarter							
On previous quarter	1.5	0.8	0.7	−0.8	—	—	—
On a year earlier	3.0	5.0	5.1	−0.8	1.6	+2.6	—

[1] GNP at market prices. [2] Annual and quarterly figures are on a different basis. Figures are subject to further revision [3] Revised. e Estimated figures.
Source: OECD National Income Accounts; German FR, Bundesbank Reihe 4; UK, Central Statistical Office; France, Ensee.

OECD area was less than 8½ per cent during 1977.

United States

The growth of GNP, very strong in the first six months of last year, slowed down in the second half of the year and is estimated to have increased by just under 5 per cent in 1977. Industrial production rose by 5½ per cent for 1977 compared with over 10 per cent in 1976.

The trade deficit on a balance of payments basis for 1977 as a whole came to 31.4 billion dollars compared with 9.32 billion in 1976. In the first 11 months of the year exports increased in value by 5½ per cent and imports by 22½ per cent, compared with the similar period of 1976. In seasonally unadjusted volume terms there was little change in exports but a rise of just under 13 per cent in imports in which an oil increase represented a significant part. These figures may be distorted by the east coast dock strike in October and November.

There was an improvement in the unemployment situation towards the end of the year with the number of unemployed as a percentage of the labour force declining appreciably to 6½ per cent at November 1977 compared with 7½ per cent at the end of 1976. The rate of inflation increased during 1977 when consumer prices for the year as a whole rose

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Table 3 **Unemployment seasonally adjusted** [7]

Numbers thousands

	Belgium [2] r	Denmark [3]	France [1]	F.R. of Germany [1]	Ireland [2]	Italy [3 9]	Nether-lands [1]	United Kingdom [1 3]	Canada [2]	United States [3]	Japan [3]
1970	71	24	262	148	42	616	46	602	495	4 089	593
1971	71	30	337	185	42	613	62	776	552	4 993	639
1972	87	30	380	246	48	696	108	885	562	4 840	730
1973	92	21	394	274	44	669	110	611	520	4 305	670
1974	105	50	498	583	48	560	135	600 [5]	521	5 076	740
1975	177	124	840	1 074	75	654	195	929	697	7 830	1 000
1976	229	126	933	1 060	84	732	211	1 269 [5]	736	7 288	1 080
1977	265	149	1 079	1 030			204	1 379	862	6 843	1 104
1975 2nd quarter	169	119	829	1 077	74	667	191	862	698	8 126	963
3rd	189	122	915	1 128	78	643	205	995	715	7 998	1 025
4th	210	123	916	1 142	81	699	210	1 128	721	7 855	1 114
1976 1st quarter	213	119	907	1 139	82	681	208	1 220	705	7 130	1 072
2nd	227	115	950	1 033	84	693	208	1 261	730	7 043	1 102
3rd	238	120	951	1 035	85	776	221	1 300	752	7 457	1 101
4th	238	126	932	1 014	84	777	206	n.a.	764	7 578	1 038
1977 1st quarter	246	140	973	1 022	82	1 459	194	1 330	822	7 068	1 032
2nd	261	147	1 096	1 017	83	1 432	198	1 341	853	6 816	1 110
3rd	276	153	1 185	1 058	83	1 692	217	1 415	875	6 814	1 150
4th	276	156	1 060	1 024			205	1 428	899	6 676	1 126
1976 October	231	125 e	935	1 022	83		214	1 306	769	7 564	1 058
November	243	125	931	1 009	83		207	n.a.	752	7 651	1 084
December	239	128	930	1 011	83		199	1 320	772	7 519	973
1977 January	242	135	945	1 053	82		196	1 330	780	6 958	1 005
February	245	139	972	1 020	82		193	1 330	829	7 183	1 032
March	250	144	1 003	992	83		192	1 329	856	7 064	1 057
April	254	144	1 039	1 015	82		192	1 334	870	6 737	1 030
May	262	147	1 097	1 008	83		197	1 324	841	6 750	1 127
June	267	149	1 151	1 028	83		206	1 364	847	6 962	1 172
July	272	149	1 180	1 066	83		212	1 399	859	6 744	1 189
August	282	154	1 216	1 066	84		220	1 410	879	6 926	1 143
September	275	155	1 160	1 043	82		218	1 435	886	6 773	1 118
October	272	156	1 100	1 033	81		212	1 432	886	6 872	1 055
November	283	159	1 055	1 028			207	1 430	900	6 818	1 150
December	273 e	153	1 026	1 010			197 e	1 422	911	6 337	1 174 e
1978 January			991					1 419		6 226	
February								1 409 e			
Rate % in latest month	10.2 e	7.3 e	5.5	4.5	11.5	—	5.1 e	5.9 e	8.3	6.3	2.2 e
% change latest three months											
On previous three months	−0.1	2.2	−11.6	−3.3	−0.8	18.2	−5.2	−1.1	2.8	−5.8	−2.1
On a year earlier	16.1	27.9	9.5	1.0	−2 4	—	−0.6	6.8	17.6	−12.4	8.5

Unemployment data are defined and collected on different bases in different countries. The following notes indicate main variations preventing direct international comparison. [1] Registered unemployed (excluding school leavers): rate per cent of total employees. [2] Insured unemployed: rate per cent of total insured population. [3] Labour force sample survey: rate per cent of total labour force. [4] Unemployment-insurance beneficiaries: rate per cent of total numbers insured. [5] Estimated in the absence of one month's figures. [6] Averaged over component months. Rates per cent relate to the last period for which unemployment figures are given. [7] Some seasonally adjusted data have been estimated from unadjusted material. [8] UK per cent changes are calculated with a non-rounded series. [9] From 1977, new method of calculating unemployment which is not consistent with the other figures. e Estimated. n.a. Not available. r Revised. Source: 'OECD Main Economic Indicators' and *Department of Employment Gazette*.

Table 4 Earnings/wages per head in manufacturing

Indices 1970 = 100

	Belgium [3]	Denmark [1 2]	France [3]	FR of Germany [3]	Ireland [2]	Italy [3]	Nether-lands [3]	Great Britain [4]	Canada [7 8]	United States [2 4]	Japan [5 8]
1971	111	115	110	113	116	112	112	111	109	106	114
1972	126	129	121	123	133	124	126	126	118	113	132
1973	147	153	138	135	159	156	143	142	128	121	163
1974	178	186	161	151	191	191	169	166	145	131	205
1975	210	222	194	165	246	241	192	209	168	143	229
1976	235	248	210	174	288	292	208	244	191	154	258
1973 1st quarter	140	137	129	131	145	137	137	134	123	118	148
2nd	144	151	133	134	157	151	140	139	126	120	155
3rd	149	160	138	137	164	161	146	144	129	122	162
4th	154	168	144	138	168	168	148	150	133	124	174
1974 1st quarter	162	172	147	146	172	176	159	147	136	126	178
2nd	173	184	155	151	188	184	167	159	141	129	203
3rd	184	189	164	154	196	194	173	172	149	133	211
4th	192	201	169	155	207	204	174	185	155	137	216
1975 1st quarter	201	209	175	162	222	228	184	194	161	140	222
2nd	207	221	180	164	241	240	188	202	166	141	219
3rd	213	224	189	166	255	247	196	215	170	144	234
4th	221	233	192	167	265	251	197	226	175	147	237
1976 1st quarter	227	237	198	170	272	258	206	233	183	150	249
2nd	232	247	207	174	280	280	206	242	190	152	251
3rd	238	250	215	176	290	310	209	247	194	156	259
4th	244	258	222	176	309	322	212	255	197	159	267
1977 1st quarter	250	259	227	184	313	344	217	260	205	162	275
2nd	254	272	232	187		367	218	266	210	165	280
3rd	258	276	240	189		386	226	268	215	169	282
% change latest quarter											
On previous quarter	1.6	1.5	3.4	1.1	1.3	5.2	3.7	0.8	2.4	2.4	0.7
On a year earlier	8.4	10.4	11.6	7.4	15.1	24.5	8.1	8.5	10.8	8.3	8.9

[1] Including mining. [2] Earnings. [3] Hourly rates industry: males. [4] Gross hourly earnings per productive worker. [5] Monthly earnings in manufacturing: regular workers. [6] Weekly earnings all employees. [7] Hourly earnings for firms employing 20 persons and over. [8] Seasonally adjusted.

Sources: All countries 'OECD Main Economic Indicators', except German Federal Republic ('Monatsberiche der Deutschen Bundesbank'. Reihe 4). Italy ('I.L.O. Yearbook' and M.E.I.') and Great Britain (*Department of Employment Gazette* and 'M.E.I.').

Table 5 Consumer prices All goods and services

Indices 1970 = 100

	Belgium	Luxem-bourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether-lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1971	104.3	104.7	106	105.3	105.3	108.9	104.8	107.5	109.4	106	102.9	104.3	106.1	105
1972	110.0	110.1	113	111.7	111.1	118.4	110.8	115.9	117.2	113	107.8	107.7	110.9	110
1973	117.7	116.8	123	119.9	118.8	131.8	122.4	125.2	128.0	122	116.0	114.4	123.9	119
1974	132.6	128.0	142	136.3	127.1	154.2	146.2	137.3	148.4	138	128.6	127.0	154.2	134
1975	149.6	141.7	156	152.2	134.7	186.4	171.3	151.3	184.4	157	142.5	138.6	172.4	150
1976	163.2	155.6	170	166.8	140.8	219.9	199.6	164.6	214.9	175	153.2	146.6	188.4	163
1977	174.8 e	166.0 e	189 e	182.7 e	146.3 e	249.9 e		175.6 e	249.0 e	195 e	165.5 e	156.1 e	203.6 e	177 e
1975 1st quarter	143.9	136.3	152	147.0	132.0	177.7	164.9	145.8	166.9	150	137.1	135.0	166.4	144
2nd	147.7	140.1	156	150.6	134.5	188.5	169.3	149.9	182.7	156	140.1	137.1	172.1	148
3rd	151.1	143.1	158	153.9	135.5	187.1	172.9	152.9	190.8	160	144.9	140.1	173.6	151
4th	155.5	147.3	157	157.3	136.7	192.2	178.1	156.3	197.3	163	147.9	142.3	177.7	155
1976 1st quarter	158.7	151.1	162	161.1	139.0	206.3	184.8	159.0	204.4	168	149.8	143.7	181.4	158
2nd	161.8	154.5	168	164.8	141.1	219.1	196.5	164.3	211.9	173	152.1	145.5	187.7	161
3rd	164.9	156.9	171	168.6	141.2	222.4	201.7	165.4	216.8	176	154.3	147.8	189.8	164
4th	167.6	159.7	178	172.9	141.9	231.8	215.5	169.6	226.8	182	156.6	149.4	194.5	168
1977 1st quarter	170.9	163.4	180	175.6	144.6	240.6	225.2	170.8	238.2	188	159.9	152.1	198.8	172
2nd	173.7	165.9	185	181.0	146.5	249.7	233.8	175.8	248.8	194	163.7	155.3	204.2	176
3rd	176.3	167.0	190	185.3	146.9	252.4	239.7 e	176.9	252.7	197 e	167.3	157.6	204.8	179
4th	178.3 e	167.7 e	200 e	188.9 e	147.2 e	256.8 e		178.8 e	256.4 e	200 e	170.9 e	159.4 e	206.4 e	182 e
1976 August	164.4	157.3	170	168.4	141.4	222.4	201.8	165.4	216.8	176	154.3	147.8	187.6	164
September	166.5	157.5	174	170.2	141.4		205.2	167.2	219.7	178	155.0	148.4	192.6	165
October	166.9	158.7	176	171.8	141.5		211.1	169.5	223.7	181	156.1	149.0	193.8	167
November	167.5	159.7	178	173.2	141.8	231.8	215.7	169.7	226.8	182	156.6	149.4	193.8	167
December	168.4	160.8	179	173.8	142.5		218.6	169.7	229.8	184	157.1	149.9	195.8	169
1977 January	170.1	162.4	179	174.3	143.8		221.4	169.5	235.9	186	158.4	150.7	197.7	170
February	171.4	163.5	179	175.5	144.7	240.7	225.7	170.8	238.2	188	159.9	152.3	198.8	172
March	171.3	164.2	181	177.1	145.2		228.5	172.2	240.5	190	161.5	153.2	200.0	173
April	172.2	165.2	183	179.4	145.9		231.3	175.1	246.7	192	162.4	154.4	203.3	175
May	173.9	165.8	186	181.1	146.5	249.7	234.2	176.0	248.6	194	163.8	155.3	205.2	176
June	175.0	166.7	187	182.5	147.2		235.8	176.4	251.2	195	164.9	156.3	204.1	178
July	175.5	167.4	188	184.1	147.0		237.2	176.1	251.4	196	166.5	157.0	203.6	178
August	176.1	167.0	190	185.1	146.9	252.4	239.4	176.7	252.7	197	167.2	157.6	203.6	179
September	177.3	166.6	192	186.7	146.7		242.5	177.8	254.0	198	168.1	158.2	207.2	181
October	177.7	167.3	199	188.2	146.9		245.7	178.4	255.1	199	169.8	158.6	208.3	182
November	178.3	168.1	200	188.9	147.1	256.8	248.1	179.0	256.4	201 e	170.9	159.4	205.8	182 e
December	179.0	167.7	201	189.5 e	147.5			178.8 e	257.7 e	201 e	172.1 e	160.1 e	205.2	183 e
1978 January	179.9 e			190.6 e	148.5 e									
Latest month on same month a year earlier	5.8	4.4	12.3	9.4	3.3	10.8	15.6	5.4	12.1	9.2	9.5	6.8	4.8	8.3
Latest three months on previous three months	1.1	0.4	5.3	1.6	0.6	1.7	3.5	1.1	1.5	1.7	2.2	1.1	0.8	1.7
On previous three months on a year earlier	6.2	5.0	12.6	9.2	3.5	10.8	16.7	5.4	13.1	9.9	9.2	6.6	6.2	8.7

Source: OECD main economic indicators.

Table 6 World trade

Quarter or quarterly averages, seasonally adjusted — US $ thousand million

	Exports (fob) from			Imports (cif) into		
	World [1]	OECD	Rest of world	World [1]	OECD	Rest of world
1970	69.69	55.01	14.68	56.41	56.41	16.05
1971	78.15	61.51	16.64	81.12	62.68	18.44
1972	92.91	72.70	20.21	94.65	74.50	20.15
1973	131.88	99.72	32.16	132.38	102.71	29.67
1974	193.66	133.23	60.43	194.37	145.77	48.69
1975	199.19	141.81	57.38	202.24	146.42	55.82
1976	225.86	157.02	68.84	228.93	168.23	60.70
1973 1st quarter	113.31	86.67	26.74	113.74	88.66	25.08
2nd	124.86	95.29	29.57	125.10	97.65	27.45
3rd	139.33	105.59	33.74	139.82	108.82	31.00
4th	149.85	111.26	38.59	150.95	115.79	35.16
1974 1st quarter	176.22	118.94	57.28	168.21	129.17	38.04
2nd	194.49	133.12	61.37	195.10	146.54	48.56
3rd	199.71	137.90	61.81	203.95	152.91	51.04
4th	203.47	142.23	61.24	208.92	153.18	55.74
1975 1st quarter	201.21	147.07	55.14	204.21	150.34	53.87
2nd	196.40	140.31	56.09	197.62	142.73	54.89
3rd	196.82	136.89	59.93	196.28	141.16	55.02
4th	202.35	143.98	58.37	209.84	150.36	59.48
1976 1st quarter	208.72	147.45	61.27	211.34	155.07	56.27
2nd	220.18	153.06	67.12	220.47	161.31	59.16
3rd	232.13	160.50	71.63	234.43	172.82	61.61
4th	242.38	167.06	75.32	249.44	183.70	65.74
1977 1st quarter	247.61	171.98	75.63	251.73	186.81	64.92
2nd	255.44	175.67	79.77	259.68	189.59	70.09
3rd		179.71			192.03	
% change latest three months						
On previous three months	3.2	2.3	5.5	3.2	1.3	8.0
On a year earlier	16.0	12.0	18.8	17.8	11.1	18.5

[1] Excludes centrally planned economies.
Source: 'OECD Series "A" ' and IMF International Financial Statistics.

Table 7 Industrial countries' trade

Quarters or quarterly averages, seasonally adjusted — US $ thousand million

	Exports (fob) to			Imports (cif)[3] from		
	World	OECD	Rest of world [2]	World	OECD	Rest of world [2]
1970	55.01	41.03	13.98	56.41	42.50	13.91
1971	61.51	45.89	15.62	62.68	47.29	15.39
1972	72.70	55.02	17.68	74.50	56.43	18.07
1973	99.72	74.57	25.15	102.71	76.24	20.47
1974	133.23	95.16	38.07	145.77	97.74	48.03
1975	141.81	96.07	45.74	146.42	99 82	46.60
1976	157.02	109.67	47.35	168.23	112.55	55.68
1973 1st quarter	86.57	65.77	20.80	88.66	67.35	21.31
2nd	95.29	71.49	23.80	97.65	73.10	24.55
3rd	105.59	78.63	26.96	108.82	80.89	27.93
4th	111.26	82.47	28.79	115.79	83.38	32.21
1974 1st quarter	118.94	87.26	31.68	129.17	88.34	40.83
2nd	133.12	96.09	37.03	146.54	97.94	48.60
3rd	137.90	97.70	40.20	152.91	101.13	51.78
4th	142.25	99.27	42.98	153.18	102.30	50.88
1975 1st quarter	146.07	99.70	46.37	150.34	104.30	46.31
2nd	140.31	94.30	46.01	142.73	98.63	44.11
3rd	136.89	91.90	44.99	142.26	95.81	46.45
4th	143.98	98.37	45.61	150.36	100.55	49.81
1976 1st quarter	147.45	103.07	44.38	155.07	104.93	50.14
2nd	153.06	107.10	45.96	161.31	108.88	52.43
3rd	160.50	111.38	49.12	172.82	114.09	58.73
4th	167.06	117.14	49.92	183.70	122.28	61.42
1977 1st quarter	171.98	121.82	50.16	186.81	123.40	63.41
2nd	175.67	122.58	53.09	189.59	125.80	63.79
3rd	179.71	123.90	55.81	192.03	126.72	65.31
% change latest three months						
On previous three months	2.3	1.1	5.1	1.3	0.7	2.4
On a year earlier	12.0	11.2	13.6	11.1	11.1	11.2

[2] Includes goods for which no destination is given. [3] Imports into Canada and the United States are valued fob.
Source: 'OECD Series "A" '.

Table 8 Exports (fob) Special trade[1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark[2]	France	F.R. of Germany	Ireland[2]	Italy	Nether-lands	United Kingdom[2] r	EEC	Canada	United States[2]	Japan[2]	OECD
1970	11 592	3 288	17 940	34 188	1 032	13 188	11 772	19 382	112 356	16 134	43 224	19 320	220 045
1971	12 081	3 609	20 592	39 009	1 308	15 177	13 953	22 365	128 084	17 676	44 211	23 994	246 037
1972	15 995	4 330	25 739	46 208	1 610	18 535	15 392	24 415	153 152	20 184	49 676	28 591	290 784
1973	22 416	6 120	35 952	67 440	2 124	22 236	23 952	30 662	210 684	25 200	71 316	36 936	398 880
1974	28 260	7 716	45 900	89 160	2 628	30 288	32 436	38 827	275 100	32 784	98 508	55 536	532 932
1975	28 812	8 712	52 212	90 024	3 216	34 824	34 440	44 270	295 992	32 304	107 652	55 752	567 804
1976	32 844	9 108	55 812	102 036	3 312	36 924	38 748	46 542	325 044	38 628	114 996	67 272	630 504
1977								57 526					
1975 1st quarter	7 731	2 172	13 434	23 481	783	8 685	8 823	11 360	76 542	8 022	27 114	14 781	146 070
2nd	6 981	2 196	13 248	23 025	753	8 571	8 565	10 975	74 367	7 890	25 803	13 734	140 847
3rd	6 540	2 073	12 591	21 279	798	8 646	8 052	10 595	70 488	7 842	27 171	13 344	136 887
4th	7 305	2 243	12 939	22 329	834	8 943	9 009	11 341	74 763	8 220	27 837	14 130	143 982
1976 1st quarter	7 467	2 136	13 395	23 427	735	8 427	8 949	11 474	76 086	9 102	26 190	15 729	147 453
2nd	7 701	2 223	13 893	24 441	820	8 919	8 733	11 452	78 183	9 555	28 668	16 443	153 063
3rd	8 151	2 340	13 881	25 851	832	9 327	9 858	11 523	81 696	9 996	29 649	16 977	160 509
4th	9 207	2 433	14 556	27 768	903	10 089	11 241	11 093	88 107	9 402	29 499	17 685	167 034
1977 1st quarter	9 156	2 548	15 282	28 134	957	10 394	10 690	12 977	90 120	10 363	29 746	19 746	171 980
2nd	9 066	2 362	15 303	28 615	1 003	11 569	10 329	14 292	92 552	10 211	31 329	19 670	175 667
3rd	9 168	2 525	16 058	29 116	1 191	10 867	11 144	14 950	95 068	10 476	30 850	20 053	179 705
4th								15 307					
1976 July	2 364	757	4 435	8 040	266	3 131	3 123	3 691	25 800	3 253	9 905	5 576	51 770
August	2 766	785	4 713	8 378	257	3 032	3 381	3 901	27 157	3 432	9 843	5 545	53 289
September	3 021	798	4 733	9 434	308	3 165	3 353	3 932	28 738	3 313	9 902	5 857	55 449
October	3 148	767	4 753	9 024	323	3 387	3 435	3 916	28 710	3 138	9 725	5 988	54 652
November	2 880	827	4 782	9 097	290	3 493	3 846	3 940	29 069	3 021	9 342	5 733	54 696
December	3 179	840	5 021	9 648	291	3 208	3 960	4 238	30 326	3 244	10 433	5 964	57 713
1977 January	3 032	852	5 175	9 285	309	3 517	3 654	4 347	30 164	3 308	9 597	6 696	57 100
February	2 950	816	5 058	9 147	323	3 299	3 643	4 293	29 521	3 378	9 801	6 499	56 507
March	3 174	880	5 049	9 702	325	3 578	3 393	4 336	30 435	3 677	10 066	6 551	58 373
April	2 997	847	4 968	9 093	334	3 883	3 542	4 698	30 364	3 451	9 949	6 894	57 997
May	2 946	722	5 314	9 584	327	3 819	3 431	4 642	30 792	3 283	10 540	6 282	58 250
June	3 123	793	5 021	9 938	342	3 867	3 356	4 951	31 396	3 477	10 084	6 494	59 420
July	2 851	813	5 031	9 236	402	3 499	3 592	5 021	30 453	3 564	10 279	6 949	58 798
August	2 916	843	5 375	9 681	387	3 850	3 905	4 823	31 799	3 548	9 675	6 601	59 464
September	3 401	869	5 652	10 199	402	3 518	3 647	5 106	32 816	3 364	10 896	6 503	61 443
October	3 213	811	5 690	10 408	379	3 652	3 691	5 017		3 526	9 257	6 874	
November		903	5 444	10 338	420	4 061		4 898		2 918	9 224	7 147	
December								5 392					
% change latest three months:													
On previous three months	6.8	5.5	8.8	7.2	6.2	0.1	8.3	2.4	2.7	−7.4	−2.2	2.4	2.3
One year earlier	6.7	8.0	17.6	12.3	30.4	11.8	10.6	26.6	16.4	3.5	1.4	16.8	12.0

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. r Revised.
Source: United Kingdom. Department of Trade; All others: 'OECD Series "A" '

by about 6½ per cent against 5¾ per cent in 1976.

Canada

After very little change in GDP in the latter half of 1976, 1977 saw a small increase in economic activity and in the first three quarters of the year, GDP was 2 per cent higher than a year earlier. Industrial production in 1977 varied little from quarter to quarter and is expected to show an increase over 1976 of about 3 per cent. Canadian unemployment problems remained throughout the year. The percentage of the labour force unemployed rose to 8½ per cent in December compared with 7½ per cent a year earlier.

Between the first 11 months of 1976 and 1977 exports (in US dollars) expanded nearly twice as rapidly as imports, while compared with a year earlier the volume of exports in the first three-quarters of 1977 increased by 8½ per cent and of imports by 2 per cent. In the first half of 1977 the balance of payments deficit on current account at US $2.95 billion showed a slight improvement on the first half of 1976.

Table 9 Imports (cif) Special trade[1], seasonally adjusted

US $ million

	Belgium/ Luxembourg	Denmark [2]	France	F.R. of Germany	Ireland [2]	Italy	Nether- lands	United Kingdom[2] r	EEC	Canada	United States[2]	Japan	OECD
1970	11 352	4 380	19 116	29 808	1 572	14 940	13 392	21 696	116 280	13 308	39 960	18 876	225 649
1971	12 390	4 476	21 261	34 356	1 838	16 026	15 159	23 918	129 403	15 460	45 633	19 716	250 717
1972	14 879	4 988	26 696	39 759	2 113	19 252	17 127	27 877	152 643	18 924	55 819	23 463	297 984
1973	21 936	7 704	37 380	54 492	2 784	27 816	24 360	38 872	215 232	23 304	69 120	38 316	410 820
1974	29 700	9 852	52 824	68 976	3 816	40 968	33 204	54 344	293 568	32 292	100 968	62 112	583 020
1975	30 708	10 332	54 240	74 208	3 804	38 364	35 148	53 618	300 048	33 960	96 936	57 864	587 376
1976	33 352	12 336	64 392	87 780	4 200	43 368	39 348	56 269	343 428	37 956	121 788	64 776	672 906
1977								63 740					
1975 1st quarter	7 467	2 424	13 902	18 552	981	9 471	9 240	14 235	76 083	8 568	24 813	14 832	150 342
2nd	7 314	2 412	13 176	18 630	924	9 024	8 739	12 941	73 311	8 457	22 683	13 779	143 442
3rd	6 945	2 478	12 879	17 982	903	9 381	8 202	13 240	71 949	8 337	24 030	14 337	142 257
4th	7 614	2 841	14 277	19 128	1 008	10 410	9 039	13 202	77 517	8 556	25 410	14 964	150 357
1976 1st quarter	7 743	2 874	15 015	19 956	1 023	10 035	8 847	13 335	78 741	9 240	27 333	14 973	155 073
2nd	7 986	2 982	15 399	20 775	975	10 578	9 444	13 942	82 083	9 630	29 295	15 300	161 313
3rd	8 286	3 126	16 335	22 431	1 059	10 620	10 002	14 386	86 244	9 612	32 043	17 004	172 821
4th	9 225	3 354	17 628	24 240	1 125	12 057	11 658	14 606	93 867	9 405	32 631	17 427	183 699
1977 1st quarter	9 645	3 381	17 568	24 351	1 296	11 832	11 385	15 322	94 824	9 876	35 439	17 721	186 811
2nd	9 465	3 211	17 082	23 882	1 246	12 214	11 182	16 429	94 779	10 192	37 685	17 141	189 594
3rd	9 236	3 341	17 601	25 532	1 409	10 851	11 391	15 779	95 255	9 884	37 629	17 881	192 034
4th								16 210					
1976 July	2 639	908	4 941	7 089	332	3 422	3 238	4 840	27 426	3 199	10 992	5 473	55 988
August	2 767	1 079	5 498	7 778	350	3 643	3 415	4 656	29 150	3 268	10 377	5 699	58 019
September	2 885	1 139	5 896	7 563	376	3 555	3 350	4 891	29 668	3 144	10 673	5 833	58 814
October	3 028	1 048	5 825	7 748	355	3 782	3 645	4 724	30 171	3 066	10 748	5 785	58 946
November	3 088	1 089	6 064	7 763	392	4 532	3 567	4 947	31 495	3 230	10 679	6 054	61 874
December	3 109	1 217	5 740	8 730	378	3 742	4 446	4 935	32 203	3 108	11 204	5 588	62 879
1977 January	3 346	1 090	6 053	8 349	463	3 870	4 075	5 520	32 781	3 257	11 430	6 173	63 065
February	3 070	1 062	5 725	7 818	418	3 995	3 803	4 872	30 777	3 326	11 582	5 677	61 071
March	3 229	1 230	5 791	8 183	415	3 968	3 505	4 930	31 264	3 294	12 427	5 873	62 675
April	3 171	1 042	5 412	7 707	399	4 240	3 764	5 183	30 945	3 482	12 721	5 742	62 334
May	3 153	1 042	5 672	8 112	418	4 276	3 723	5 394	31 811	3 394	12 050	5 785	62 827
June	3 141	1 127	5 998	8 063	429	3 699	3 695	5 851	32 023	3 316	12 914	5 614	64 433
July	2 828	1 029	5 478	8 563	451	3 622	3 792	5 475	31 275	3 339	12 877	5 731	63 443
August	3 303	1 125	6 060	8 393	457	3 705	3 985	4 936	32 002	3 285	11 984	6 184	64 338
September	3 105	1 187	6 063	8 576	501	3 524	3 614	5 369	31 978	3 260	12 768	5 965	64 253
October	3 268	1 002	5 980	8 566	471	4 243	3 792	5 337		3 329	12 494	5 933	
November		1 116	6 356	8 834	486	4 035		4 998		2 886	11 469	6 057	
December								5 875					
% change latest three months:													
On previous three months	6.1	0.7	4.9	3.8	9.1	7.0	1.6	2.7	0.5	−4.7	−2.8	2.4	1.3
One year earlier	11.5	0.9	3.5	12.6	29.8	−0.6	9.4	11.0	10.4	0.4	14.4	1.6	11.1

[1] For most purposes special trade may be defined as trade excluding re-exports. [2] General trade. [3] fob. r Revised.

Source: United Kingdom, Department of Trade; All others: 'OECD Series "A"'.

Table 10 Balance of payments on current account

US $ million (unadjusted)

	Belgium/ Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether- lands	United Kingdom	EEC	Canada	United States	Japan
1970	713	−544	297	848	−183	902	−522	1 759	3 270	1 077	2 383	1 970
1971	846	−423	530	874	−183	2 041	−159	2 575	6 101	422	−1 328	5 797
1972	1 142	−63	297	748	−125	2 266	1 290	289	5 844	−388	−5 824	6 624
1973	1 153	−464	−691	4 372	−224	−2 510	2 342	−2 346	1 632	107	6 892	−136
1974	911	−981	−5 942	9 722	−679	−8 039	2 061	−8 443	−11 390	−1 540	1 168	−4 693
1975	705	−492	−3	3 896	−66	−530	1 658	−3 740	1 428	−4 719	17 738	−682
1976	−299	−1 906	−6 033	3 396	−271 e	−2 856	2 385	−2 172	−7 756	−4 230	3 507	3 680
1973 1st quarter	369	−161	−225	552		−699	492	−939		−343	808	494
2nd	185	−188	280	1 068		−736	679	−51		148	771	−416
3rd	221	59	−542	852		−14	36	−573		35	994	101
4th	379	−174	−204	1 900		−1 060	1 134	−783		66	4 320	−315
1974 1st quarter	338	−524	−1 604	2 763		−2 481	478	−2 217		−550	1 274	−3 289
2nd	−122	−316	−1 861	2 222		−2 479	543	−2 172		−158	−194	−2 403
3rd	320	−147	−1 928	869		−1 439	573	−2 030		6	−2 446	−134
4th	375	6	−548	3 868		−1 639	468	−2 024		−838	2 535	1 133
1975 1st quarter	558	−85	−371	2 234		−460	144	−1 581		−1 847	4 353	−925
2nd	77	56	941	792		142	645	−795		−1 089	5 448	−300
3rd	−93	−81	−128	−456		859	194	−1 211		−678	1 829	−23
4th	162	−382	−446	1 326		−1 070	674	−153		−1 105	6 108	566
1976 1st quarter	−366	−584	−1 313	1 352		−1 414	835	−296		−1 915	2 687	−110
2nd	30	−416	−522	801		−1 339	186	−636		−1 101	2 515	941
3rd	−298	−402	−2 472	−512		734	496	−608		−107	−2 496	984
4th	336	−504	−1 725	1 755		−837	867	−632		−1 108	800	1 865
1977 1st quarter	−3	−468	−1 631	819		−922	66	−1 014		−1 549	−2 343	893
2nd			−361	1 451		161	−180	−593		−1 408	−3 786	2 182
3rd				−1 985				916			−6 140	3 367

Source: UK Economic Trends. All others: IMF International Financial Statistics

Compared with the same period in 1976 the rise in consumer prices accelerated from just over 6½ per cent in the first quarter to an estimated 9 per cent in the fourth quarter; The rate of inflation for the year as a whole is expected to be around 8 per cent.

Japan

Following an increase approaching 3 per cent in the first quarter, GNP continued to grow slowly in the second and third quarters. Industrial production increased moderately in the first six months of 1977 but became sluggish in the autumn and is estimated to have risen by only 4½ per cent over the year compared with a 13½ per cent increase in 1976.

In dollar value exports rose by 20½ per cent and imports by 9½ per cent in the first 11 months of 1977 compared with the same period a year earlier. Over the same period and in seasonally unadjusted volume terms there was an increase of between 5 and 5½ per cent in exports and under 3 per cent in imports. The decline in the growth of export volume is partly due to the strong appreciation of the yen and the deterioration in Japanese price competitiveness. The current balance for 1977 was in surplus by 11.0 billion dollars, compared with just under 3.7 billion dollars in 1976.

Unemployment has been edging upwards, while consumer prices increased by just over 8 per cent in the year 1977 over 1976 compared with over 9 per cent for the previous year.

Federal Republic of Germany

Provisional statistics issued by the Federal Statistical Office suggest that GDP grew by only 2½ per cent in 1977, less than half the growth achieved in 1976. There was very little movement in industrial production during the year and it is estimated in 1977 to

Table 11 Export volume (1970 = 100)

	Belgium/ Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether- lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1971	107	105	108	106	116	108	113	109	108	106	99	121	107
1972	123	113	124	115	122	121	121	111	117	115	108	129	116
1973	139	124	137	135	135	124	143	126	133	127	133	136	132
1974	140	132	150	150	141	133	145	133	142	122	145	158	140
1975	131	133	146	134	153	135	139	130	134	112	141	161	134
1976	149	134	157	153	160	152	153	139	149	127	145	195	148
1977								152 e					
1974 1st quarter	142	134	153	155	143	132	145	126	144	122	140	142	139
2nd	143	128	149	149	135	128	145	134	142	118	148	156	141
3rd	137	134	148	148	140	136	148	138	142	123	144	160	141
4th	134	133	149	147	152	131	144	131	139	117	143	166	140
1975 1st quarter	131	126	148	134	150	133	135	133	135	111	141	159	134
2nd	121	127	140	131	135	132	132	127	130	112	137	151	130
3rd	124	126	141	132	157	135	137	126	132	110	143	155	132
4th	140	138	146	141	164	142	152	134	141	112	146	172	140
1976 1st quarter	141	128	149	145	142	145	147	135	143	121	138	194	143
2nd	143	131	158	150	158	151	143	140	147	126	146	195	147
3rd	147	138	159	157	159	150	155	137	149	130	149	194	151
4th	157	137	163	158	175	159	169	145	157	124	145	193	154
1977 1st quarter	157	141	165	158	175	157	157	144	155	137	144	207	154
2nd	151	129	164	159	175	170	147	155	157	135	147	201	156
3rd	151	139	166	158	203	159	158	157	157	137	149	204	157
4th								153 e					
% change latest three months:													
On previous three months	—	7.8	1.2	−0.6	16.0	−6.5	7.5	−2.6	—	1.5	1.4	1.5	0.6
On a year earlier	2.7	0.7	4.4	0.6	27.7	6.0	1.9	5.5	5.4	5.4	—	5.2	4.0

The volume figures are derived from the figures in table 8 and the average value indices published by the OECD converted to dollar terms.

Source: United Kingdom: Department of Trade

Table 12 Import volume (1970 = 100)

	Belgium/ Luxembourg	Denmark	France	F.R. of Germany	Ireland	Italy	Nether- lands	United Kingdom	EEC	Canada	United States	Japan	OECD
1971	107	98	107	111	108	101	105	105	106	110	109	100	105
1972	119	101	123	122	116	111	111	116	116	129	123	113	117
1973	138	120	140	130	138	125	127	133	130	149	130	145	131
1974	143	114	146	127	136	118	120	134	128	164	126	141	130
1975	135	108	135	130	117	105	115	124	121	155	122	123	121
1976	152	127	162	152	140	121	127	133	139	167	136	137	137
1977								141 e					
1974 1st quarter	143	120	151	123	132	124	119	132	129	162	126	147	131
2nd	141	110	147	125	139	116	118	137	127	160	127	140	129
3rd	138	104	145	129	136	122	122	135	128	167	130	142	131
4th	130	100	140	130	120	112	117	131	124	163	126	139	128
1975 1st quarter	126	97	133	125	119	100	114	126	118	156	113	121	119
2nd	125	96	128	127	111	96	109	119	115	155	103	115	115
3rd	126	106	133	131	117	105	111	126	120	152	113	125	120
4th	133	123	148	139	132	117	121	127	130	158	119	129	127
1976 1st quarter	138	122	153	143	135	121	116	126	131	164	125	128	130
2nd	141	125	158	148	136	116	124	134	135	168	132	132	133
3rd	142	128	166	153	140	114	126	136	138	167	142	143	139
4th	152	131	173	162	151	130	141	138	147	167	143	143	145
1977 1st quarter	156	128	167	159	159	123	137	140	143	170	151	141	144
2nd	148	121	159	153	148	130	131	145	141	175	157	136	144
3rd	143	126	162	160	163	110	133	140	139	164	154	140	144
4th								140 e					
% change latest three months:													
On previous three months	−3.4	4.1	1.9	4.6	10.1	−15.4	1.5	—	−1.4	−6.3	−1.9	2.9	—
On a year earlier	0.7	−1.6	−2.4	4.6	16.4	−3.5	5.6	1.4	0.7	−1.8	8.5	−2.1	3.6

The volume figures are derived from the value figures in table 9 and the average value indices published by the OECD converted to dollar terms.

Source: United Kingdom: Department of Trade

Table 13 Exports of manufactures by the main manufacturing countries

	Canada	United States[1]	Japan	Sweden	Switzerland	Belgium/ Luxembourg	France	F.R. of Germany	Italy	Nether-lands	United Kingdom (seasonally adjusted)	Total[1] (seasonally adjusted)	UK share per cent
Value US $ thousand million (fob)				Quarters or quarterly averages									
1970	2.39	7.17	4.53	1.31	1.16	2.40	3.40	7.67	2.77	1.70	4.08	38.57	10.6
1971	2.61	7.42	5.66	1.44	1.31	2.57	3.85	8.75	3.16	2.02	4.77	43.54	10.9
1972	2.94	8.27	6.77	1.68	1.57	3.31	4.76	10.38	3.91	2.53	5.16	51.27	10.1
1973	3.42	10.95	8.69	2.34	2.17	4.57	6.52	15.08	4.65	3.44	6.41	68.23	9.4
1974	4.13	15.57	13.12	3.03	2.73	5.76	8.40	19.74	6.22	4.74	8.01	91.44	8.8
1975	4.17	17.36	13.29	3.46	3.01	5.70	10.03	19.90	7.29	4.83	9.15	98.20	9.3
1976	5.16	18.99	16.14	3.69	3.40 p	6.48 p	10.75	22.68	7.80 p	5.52 p	9.64	110. 27 p	8.8 p
1973 1st quarter	3.30	9.89	7.10	2.11	1.84	3.92	5.69	12.42	3.52	3.22	5.80	60.07	9.7
2nd	3.51	11.04	8.17	2.28	2.12	4.42	6.67	14.33	4.46	3.39	6.42	64.71	9.9
3rd	2.94	10.52	9.06	2.18	2.23	4.62	6.27	16.18	5.04	3.41	6.70	72.34	9.3
4th	3.93	12.33	10.41	2.77	2.49	5.33	7.47	17.37	5.60	3.74	6.72	75.79	8.8
1974 1st quarter	3.72	14.09	9.66	2.53	2.45	5.02	7.40	17.83	5.17	4.19	6.89	80.63	8.5
2nd	4.19	16.05	13.07	3.16	2.79	6.34	8.69	20.22	5.88	5.02	7.83	90.45	8.7
3rd	3.97	15.15	14.07	2.95	2.34	5.50	8.11	19.38	6.79	4.83	9.02	95.98	9.4
4th	4.64	16.97	15.70	3.49	3.33	6.17	9.40	21.53	7.04	4.91	8.29	98.72	8.4
1975 1st quarter	3.97	16.89	12.51	3.54	2.95	6.16	10.25	19.78	6.92	4.86	9.37	99.24	9.4
2nd	4.35	17.93	13.04	3.77	3.13	6.00	10.98	21.02	7.28	5.13	9.11	98.67	9.2
3rd	3.73	16.48	13.14	2.91	2.71	4.72	8.62	18.40	7.19	4.16	8.77	94.97	9.2
4th	4.63	18.16	14.48	3.62	3.25	5.92	10.27	20.41	7.76	5.16	9.33	99 89	9.3
1976 1st quarter	4.63	18.20	13.80	3.51	3.08	6.07	10.40	20.80	6.81	4.92	9.58	104.49	9.2
2nd	5.53	19.92	15.75	3.68	3.38 p	6.64	11.23	21.90	7.46	5.28	9.49	106.47	8.9
3rd	4.99	17.95	16.79	3.45	3.20 p	5.83 p	9.62	22.26	7.87 p	5.33	9.60	111.67 p	8.6 p
4th	5.44	19.89	18.23	4.12	3.95 p	7.39 p	11.75	25.77	9.08 p	6.56 p	9.88	118.24 p	8.4 p
1977 1st quarter	5.78 p	19.40	17.26 p	3.88	3.57 p	7.25 p	11.98 p	24.73	8.45 p	5.90 p	10.55	121.94 p	8.7 p
2nd	6.27 p	20.59	19.03 p	4.00	3.77 p	7.46 p	12.53 p	25.38	9.61 p	5.92 p	11.64	121.70 p	9.5 p
3rd	5.32 p	19.13	19.88 p	3.19	3.82 p		11.15 p	24.88		5.68 p	12.20	126.07 p	9.7 p

													Relative volume UK as per-centage of total
Volume index 1970 = 100													
1971	106	101	120	105	103	106	108	106	107	115	110	108	102.3
1972	115	111	129	107	111	123	122	116	124	128	112	117	95.8
1973	128	135	136	125	122	138	134	134	133	146	128	133	96.2
1974	129	158	159	134	127	140	152	150	146	155	135	148	91.2
1975	123	152	162	126	115	128	149	133	146	146	130	141	92.8
1976	139	156	200	129	131 p	147 p		152	166 p	167 p	140	156 p	89.8 p
1973 1st quarter	125	128	125	125	117	134	133	128	107	153	124	130	95.3
2nd	131	139	133	124	120	137	139	133	133	148	126	129	97.8
3rd	111	129	136	109	115	130	121	130	139	136	130	134	97.4
4th	143	143	149	143	134	151	145	144	152	145	131	139	94.3
1974 1st quarter	122	155	129	131	128	139	155	151	140	152	130	145	89.2
2nd	131	170	158	138	132	153	162	151	143	165	135	147	91.7
3rd	122	149	168	125	108	129	140	144	150	153	141	150	93.5
4th	141	160	182	143	139	140	153	153	149	151	133	148	90.1
1975 1st quarter	112	151	144	128	110	129	153	127	136	137	134	138	96.9
2nd	127	157	153	131	121	130	155	135	144	147	127	137	92.7
3rd	113	144	162	110	99	112	132	127	145	133	127	139	91.6
4th	138	156	189	135	129	143	157	144	158	167	133	148	90.3
1976 1st quarter	125	153	182	128	122	143		145	153	156	137	153	89.6
2nd	148	165	201	132	130 p	154		150	167	165	141	154	91.3
3rd	133	147	206	121	123 p	133 p		148	161 p	162	139	157 p	88.4 p
4th	149	158	212	135	148 p	159 p		163	183 p	186 p	144	161 p	89.5 p
1977 1st quarter	151 p	155	193 p	124	134 p			155	160 p	167 p	144	162 p	89.0 p
2nd	165 p	163	209 p		141 p			158		165 p	154	160 p	96.4 p
3rd		147	216 p		143 p			151			158	163 p	96.7 p

													Ratio of UK to weighted average
Unit value index in US $ 1970 = 100													
1975 weights	0.0419	0.1738	0.1552	0.0436	0.0343	0.0587	0.1132	0.2457	0.0825	0.0510		Weighted average ex UK	
1971	103	102	104	105	109	101	105	108	106	104	107	105	102.2
1972	107	104	116	120	122	112	115	117	114	117	116	113	102.6
1973	112	113	141	143	154	137	143	147	126	139	127	135	94.1
1974	134	137	181	173	185	171	162	172	154	178	152	163	93.1
1975	142	159	178	210	220	185	197	195	180	195	176	182	96.5
1976	156	170	178	218	224	184		195	169	194	175	184 p	94.8 p
1973 1st quarter	111	108	125	129	136	122	126	127	119	124	118	121	97.3
2nd	112	111	136	140	152	134	141	141	121	135	128	131	97.8
3rd	111	114	147	153	167	148	153	162	131	148	130	143	91.2
4th	115	120	154	149	160	147	152	157	133	152	131	144	90.7
1974 1st quarter	128	127	165	148	165	150	141	154	133	163	134	147	91.2
2nd	134	132	183	175	182	173	158	175	148	179	152	162	93.5
3rd	136	142	185	181	187	177	170	175	163	186	158	168	93.7
4th	138	148	190	187	206	183	181	183	171	192	164	175	93.8
1975 1st quarter	148	156	192	211	231	199	197	203	184	209	177	189	93.9
2nd	143	159	188	220	224	192	208	203	183	205	181	189	95.5
3rd	138	159	179	202	210	176	193	189	179	185	173	179	96.7
4th	141	162	169	206	217	172	193	185	177	182	173	177	97.8
1976 1st quarter	155	166	167	209	218	177		187	161	186	177	178 p	99.3 p
2nd	158	168	173	214	224	180		190	161	189	171	181 p	94.4 p
3rd	157	170	180	218	225	183		196	176	194	177	186 p	95.2 p
4th	153	175	190	234	230	194		206	179	208	175	193 p	90.4 p
1977 1st quarter	161	175	197	240	229	..		208	191	208	190	197 p	96.5 p
2nd	159	176	201		230	..		210		212	195	199 p	97.7 p
3rd		181	203		230	195		215			202		

[1] Excluding 'special category exports' for which detailed information on countries of destination is withheld by the United States authorities.

Sources: Values. United Kingdom and Total: DTI. Other countries: OECD updated from national sources. Volume. Derived from the value figures and the unit value index numbers. Unit values United Kingdom and Total: DTI. Other countries: United Nations. The weighting reflects the relative importance of each country in UK's overseas markets. The ratio indicates the UK competitive position.

be 3½ per cent up on the previous year compared with 7½ per cent in 1976.

In the period January to November 1977 the dollar value of both exports and imports was 16 per cent higher than in the corresponding period of 1976. There was an increase in the volume of both exports and imports, of just over 5 per cent based on unadjusted figures. The current account surplus for 1977 amounted to 3.6 billion dollars compared with 3.4 billion dollars in 1976.

Unemployment fell slightly from the summer of 1977; however, for the third successive year, the average rate of unemployment as a percentage of the labour force remained around 4½ per cent. With the increase in consumer prices falling from 4½ for 1976 on 1975 to below 4 per cent for 1977 on 1976, Germany still has one of the lowest inflation rates in the OECD area.

France

Industrial production fell by 3 per cent in the second quarter from the first quarter peak and then remained fairly stable for the rest of last year.

Exports in the first 11 months of 1977 increased in dollar value by 14 per cent and imports by 10 per cent compared with the same period a year earlier; the growth in both was considerably slower than for the year 1976 as a whole. Volume figures for January to September show an increase of 6 per cent and 2 per cent in exports and imports respectively over the same period a year earlier. Rates of increase that are lower than those of 7½ per cent and 20 per cent recorded for the year 1976 on 1975. According to figures released recently by the Ministry for Foreign trade the trade deficit for 1977 was almost halved from 20.59 billion French francs in 1976 to 11.39 billion French francs in 1977.

The unemployment position deteriorated in the second and third quarters; however towards the end of 1977 there were signs of an improvement although unemployment still remained disturbingly high and well above 1976 levels.

Despite a rapid rise in food prices the rate of inflation has slowed; consumer prices increased by 9 per cent through 1977 compared to 10 per cent during 1976.

Italy

Economic activity slackened considerably following a sharp rise in output in the first quarter of 1977. Industrial production fell by 7 per cent in the second quarter and a further 1½ per cent in the third quarter of 1977. Provisional figures suggest a further fall towards the end of the year, with industrial output probably being no more than 1½ per cent above the 1976 level for 1977 as a whole. There was a sharp increase in unemployment during the year; in October 7.4 per cent of the labour force was unemployed compared with 6.8 per cent in January.

There has been a marked improvement in the balance of payments position, partly due to the introduction of certain stabilisation measures by the government earlier in the year and a large increase in receipts from tourism. Provisional data published by the Bank of Italy shows a surplus of 1680 billion lire for the first 11 months of last year against a deficit of 1500 billion lire in the corresponding period of 1976. On a trade accounts basis export values in dollar terms have grown much more strongly than imports and in the 11 months to November 1977 were 21 per cent higher than a year earlier compared to a 9 per cent rise in import values. The volume of exports and imports over the first 9 months increased by around 9 per cent and 3½ per cent respectively.

The monthly rise in consumer prices slowed down slightly during the year, mainly due to favourable import prices helped by the slower depreciation of the lire and a reduction in the growth of wage costs. Despite the improvement the Italian inflation rate still remains the highest of the main industrial countries.

Exports of manufactures

Exports of manufactures by the main manufacturing countries in the first three quarters of 1977 increased in dollar value by 14½ per cent compared with the similar period of 1976. After declining slightly in the second quarter there was a marked improvement in the third. In volume terms it is estimated that this represents a rise of around 4½ per cent in the same period. The UK value share improved in the second and third quarters of last year. The provisional figures for the first nine months of 1977 indicate a share of 9.3 per cent compared with 8.8 per cent for the year 1976 as a whole. The UK export performance in volume terms followed a similar pattern to the value share. UK price competitiveness deteriorated in the first half for 1977 when relative export prices rose sharply. The limited information available for competitions' prices in the third quarter suggests a further worsening of the UK position.

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Gas consumption up 6 per cent last year: Energy Trends

Final figures for 1977 show that total inland energy consumption – on a primary fuel input basis – was 332.4 million tons of coal equivalent (mtce), 7.7 mtce higher than in the previous year.

In *Energy Trends*, published on 23 February, the Department of Energy says that all primary fuels shared in the increase. Provisional figures show that gas consumption rose by 6 per cent, accounting for almost half the total increase in primary energy consumption. Nuclear electricity increased by 11 per cent to 14 mtce, an additional 1.4 mtce. Coal consumption rose by 1 million tons to 121 million tons, its highest level since 1973, and petroleum deliveries increased by 1.3 per cent.

The bulletin points out that the increase in consumption last year was confined to the first three quarters of the year, in which temperatures were low. During the last quarter, when the weather was warm compared to the previous year, total consumption fell by 1.7 per cent.

Cold weather in the third quarter of 1977 contributed to an increase in domestic energy consumption of 11.3 per cent. Consumption rose slightly during that quarter in all sectors except iron and steel and overall consumption was 4.8 per cent higher than in the same quarter of 1976.

Coal – steep drop in coke oven use

Consumption of coal at coke ovens in 1977 fell by 9.4 per cent to 17.3 million tons, its lowest level since the second world war. This was due to the low level of activity in the steel industry. Coal consumption overall last year rose by 0.5 per cent, with power station use up by 2.8 per cent to over 78 million tons. Deep-mined coal production last year was 3 million tons (2.8 per cent) lower than in 1976, but opencast coal production rose by 1.5 million tons to 13.3 million tons, representing nearly 11 per cent of total coal production for the year.

Gas – faster growth in 1977

Over 15.3 thousand million therms of gas were sent out in 1977, 900 million therms more than in the previous year and the fastest rate of growth achieved since 1974.

Electricity – growing nuclear contribution

Total electricity supplied in 1977 was almost 3 per cent higher than in the previous year and nearly 1 per cent greater than 1973, the previous peak year. About half of the additional electricity supplied was provided by nuclear power stations.

Petroleum – imports down

Net arrivals of overseas crude oil in 1977 totalled 54 million tonnes, 32 million tonnes less than in 1976. Total indigenous crude oil production last year was nearly 38 million tonnes. Deliveries of petroleum products in 1977 were 82 million tonnes, 1.7 million tonnes more than in the previous year.

Fuel imports and exports

The total value of crude oil imports in the last quarter of 1977 was £898 million, £340 million (27.5 per cent) less than in the same quarter of 1976. The volume of crude oil imports fell by 36 per cent, the difference between value and volume being due to the higher average price of imported crude in 1977. The value of petroleum exports in 1977 rose by over 68 per cent to £1,977 million and the value of coal exports rose by 43 per cent to £44 million.

Index to statistics

An index to statistics published regularly in *Trade and Industry* appears each week at the end of the statistics sections.

Manufacturers' and distributors' stocks: fourth quarter 1977

It is provisionally estimated that the level of stocks held by manufacturers, wholesalers and retailers fell by about £50 million at 1970 prices, seasonally adjusted, in the fourth quarter of 1977, following the fall of £70 million in the third quarter. These two falls only partially offset the very large rises recorded in the first half of 1977, leaving an increase of about £360 million during the year as a whole.

Manufacturing industry

It is provisionally estimated that manufacturers' stocks fell by about £20 million at 1970 prices, seasonally adjusted, in the fourth quarter of 1977. Stocks of materials and fuel fell by about £55 million and finished goods by about £35 million, whilst work in progress is estimated to have risen by about £65 million. During 1977 as a whole, manufacturers' stocks increased by about £240 million, over 60 per cent of which is accounted for by a large rise in finished goods stocks.

The stock/output ratio at the end of December rose to 108.2 from the revised September level of 107.2, due to a fall of about 1 per cent in manufacturing output.

Distributive industries

Provisional results indicate that wholesalers' stocks increased in the fourth quarter by about £10 million, at 1970 prices, seasonally adjusted. This implies an exceptionally large increase (more than £100 million) over the year. Retailers' stocks declined by about £40 million, at 1970 prices, seasonally adjusted, in the fourth quarter, implying a small rise over the year.

Notes

The estimation of physical changes in stocks is subject to greater error when the rate of price increase is varying and this should be borne in mind when using the figures.

Inquiries: Manufacturing, 01-215 3176/5215. Distributive, 01-215 3345.

Table 1 Value of physical increase in industry's stocks at 1970 prices seasonally adjusted

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1976	14,287	10 528	1 830	1,929
1970	377	325	68	−16
1971	−78	−148	52	18
1972	−82	−145	48	15
1973	1 078	597	102	379
1974	606	634	81	−109
1975	−605	−429	−111	−65
1976	37	5	23	9
1977 p	361	237	107	17
1970				
1st qtr	33	47	4	−17
2nd	144	117	21	6
3rd	93	75	17	1
4th	107	87	27	−6
1971				
1st qtr	13	13	14	−14
2nd	−53	−89	28	9
3rd	−17	−40	13	11
4th	−21	−31	−2	12
1972				
1st qtr	−53	−83	21	8
2nd	−21	−60	−2	41
3rd	−22	−21	14	−15
4th	15	19	15	−19
1973				
1st qtr	330	199	39	92
2nd	381	166	7	209
3rd	181	111	30	40
4th	185	121	26	38
1974				
1st qtr	−69	−71	21	−20
2nd	284	211	48	25
3rd	345	377	5	−37
4th	46	117	6	−77
1975				
1st qtr	−98	−31	−23	−44
2nd	−186	−74	−51	−61
3rd	−218	−209	−26	16
4th	−103	−115	−12	24
1976				
1st qtr	59	—	26	33
2nd	−131	−66	−20	−45
3rd	28	−2	14	16
4th	81	73	3	5
1977				
1st qtr	278	125	51	102
2nd	199	164	39	−5
3rd	−70	−31	5	−44
4th p	−45	−21	12	−36

Table 2 Value of the physical increase of stocks held by manufacturing industry at 1970 prices seasonally adjusted

£ million

	Analysis by industry group							Analysis by type of asset		
	All manufacturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manufacture	Engineering, shipbuilding, vehicles and metal goods	Textiles, leather and clothing	Other manufacturing industries	Materials and fuel	Work in progress	Finished goods
Level of stocks at end 1976	10 528	1 327	1 146	917	5 216	846	1 076	3 543	4 083	2 903
1970	325	11	43	50	222	1	−1	113	122	90
1971	−148	11	17	5	−164	−14	−3	−146	−98	96
1972	−145	20	3	−44	−85	−53	15	−41	32	−136
1973	597	75	95	−8	358	12	65	303	324	−30
1974	634	75	155	26	261	41	76	287	86	262
1975	−429	−99	−44	39	−149	−39	−137	−391	−118	80
1976	5	−1	54	83	−103	−25	−4	−61	10	56
1977 p	237							15	74	147
1970										
1st qtr	47	6	19	−11	15	9	8	13	—	33
2nd	117	7	4	19	90	2	−5	56	59	2
3rd	75	4	11	15	48	—	−4	34	17	24
4th	87	−6	8	26	69	−11	—	10	47	30
1971										
1st qtr	13	8	−5	29	−30	8	3	−22	−25	60
2nd	−89	−5	16	−24	−42	−31	−3	−44	−62	17
3rd	−40	−11	−2	−7	−23	6	−3	−44	−4	8
4th	−31	20	9	7	−69	4	−1	−36	−7	12
1972										
1st qtr	−83	7	15	−57	−19	−14	−15	−15	7	−75
2nd	−60	16	−21	9	−65	−11	12	−50	21	−31
3rd	−21	−7	7	−1	−9	−16	5	2	−2	−22
4th	19	3	3	5	7	−11	12	22	6	−8
1973										
1st qtr	199	5	22	20	113	−8	47	89	110	—
2nd	166	25	35	2	92	8	3	94	75	−3
3rd	111	27	21	−9	60	4	10	44	82	−14
4th	121	18	17	−22	93	9	6	77	57	−13
1974										
1st qtr	−71	24	37	−57	−38	−7	−29	64	−24	−110
2nd	211	30	36	7	55	30	53	68	22	121
3rd	377	43	72	43	145	24	49	135	73	169
4th	117	−22	10	33	99	−6	2	20	15	82
1975										
1st qtr	−31	−10	−9	47	−18	−5	−37	−136	18	88
2nd	−74	−50	−23	23	26	−17	−33	−51	−22	−1
3rd	−209	−28	−25	−22	−76	−16	−42	−141	−61	−7
4th	−115	−11	14	−9	−81	−3	−25	−63	−52	—
1976										
1st qtr	—	−18	16	−11	10	12	−9	−26	12	13
2nd	−66	−6	15	12	−61	−19	−7	−28	−34	−4
3rd	−2	−1	15	44	−58	−10	7	7	−17	7
4th	73	24	7	38	7	−9	6	−15	48	40
1977										
1st qtr	125	−11	18	13	70	9	26	55	44	26
2nd	164	20	8	12	82	22	22	39	−5	130
3rd	−31	28	1	−11	−43	−2	−3	−26	−32	27
4th p	−21							−53	67	−35

Table 3 Value of the physical increase of stocks held by wholesalers at 1970 prices seasonally adjusted

£ million

	Total wholesalers	General wholesale distributors	Dealers in coal, builders materials etc.	Dealers in industrial materials and machinery
Level of stocks at end 1976	1 830	1 037	158	635
1970	68	15	—	53
1971	52	41	−3	14
1972	48	41	11	−3
1973	102	127	−1	−24
1974	81	6	—	75
1975	−111	−142	−13	44
1976	23	−3	11	16
1977 p	107			
1970				
1st qtr	4	−4	—	8
2nd	21	12	−3	12
3rd	17	−5	−1	24
4th	27	12	4	10
1971				
1st qtr	14	1	−1	14
2nd	28	22	—	6
3rd	13	11	1	2
4th	−2	7	−2	−7
1972				
1st qtr	21	3	−2	20
2nd	−2	2	2	−6
3rd	14	23	3	−11
4th	15	13	9	−6
1973				
1st qtr	39	40	−6	5
2nd	7	14	4	−12
3rd	30	40	2	−13
4th	26	32	−1	−4
1974				
1st qtr	21	23	−1	−1
2nd	48	22	2	24
3rd	5	−21	−3	29
4th	6	−18	2	22
1975				
1st qtr	−23	−44	2	19
2nd	−51	−53	−8	10
3rd	−26	−25	−5	4
4th	−12	−20	−2	10
1976				
1st qtr	26	14	13	−1
2nd	−20	3	−6	−17
3rd	14	−11	6	19
4th	3	−10	−2	14
1977				
1st qtr	51	24	6	21
2nd	39	24	6	10
3rd	5	−7	−16	29
4th p	12			

Table 4 Increase in the book value of manufacturers' and distributors' stocks

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1976	33 554	26 342	4 502	3 799
1970	1 302	1 038	162	102
1971	764	471	160	133
1972	949	618	217	114
1973	3 646	2 571	593	481
1974	6 330	5 132	779	419
1975	3 227	2 568	212	447
1976	6 126	4 787	873	466
1977 p	4 569	3 231	719	618
1970				
1st qtr	323	288	16	18
2nd	351	293	26	33
3rd	267	174	78	15
4th	362	284	43	36
1971				
1st qtr	259	211	29	20
2nd	294	180	60	54
3rd	112	28	70	13
4th	99	53	—	46
1972				
1st qtr	90	60	5	26
2nd	197	113	25	59
3rd	251	148	106	−3
4th	412	298	82	32
1973				
1st qtr	659	487	71	101
2nd	739	554	88	96
3rd	1 018	664	239	115
4th	1 230	867	194	169
1974	1 763	1 501	204	59
2nd	1 853	1 447	224	182
3rd	1 525	1 254	199	72
4th	1 188	930	152	106
1975				
1st qtr	978	933	16	61
2nd	627	608	20	38
3rd	541	262	124	154
4th	1 081	764	123	194
1976				
1st qtr	1 058	879	124	55
2nd	1 263	1 125	147	−9
3rd	1 662	1 155	340	168
4th	2 142	1 628	262	252
1977				
1st qtr	1 875	1 377	203	296
2nd	1 339	980	234	125
3rd	627	376	185	66
4th p	727	498	98	131

Table 5 Relationship of manufacturers' stocks to manufacturing production

Index numbers – 4th qtr 1969 = 100
Seasonally adjusted

	Stock levels at 1970 prices	Production (with 1970 net output weight)	Ratio of stocks to production
1967			
1st qtr	94	89	105.4
2nd	94	90	104.6
3rd	94	90	104.5
4th	94	92	102.6
1968			
1st qtr	93	94	98.8
2nd	94	96	98.4
3rd	96	96	99.5
4th	97	97	99.8
1969			
1st qtr	98	98	100.0
2nd	99	100	98.7
3rd	99	100	99.5
4th	100	100	100.0
1970			
1st qtr	101	100	100.9
2nd	102	100	101.7
3rd	103	100	102.2
4th	103	101	102.3
1971			
1st qtr	104	99	104.1
2nd	103	100	102.3
3rd	102	100	102.6
4th	102	99	102.7
1972			
1st qtr	101	97	103.8
2nd	100	102	98.5
3rd	100	103	97.2
4th	100	107	93.8
1973			
1st qtr	102	110	93.1
2nd	104	110	94.5
3rd	105	112	94.2
4th	107	111	95.7
1974			
1st qtr	106	107	98.9
2nd	108	111	97.1
3rd	112	111	100.6
4th	113	107	105.4
1975			
1st qtr	113	107	105.5
2nd	112	102	110.2
3rd	110	101	109.1
4th	109	101	107.1
1976			
1st qtr	109	102	106.6
2nd	108	104	104.0
3rd	108	104	103.7
4th	109	105	103.4
1977			
1st qtr	110	106	104.2
2nd	112	103	108.3
3rd	111	104	107.2
4th p	111	103	108.2

Notes to tables 1 to 4

1 The analysis by industry group follows the standard industrial classification (1968 edition):
Manufacturing orders III to XIX.
Distributive trades order XXII:
Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses)
Retail MLH 820, 821.

2 Book values exclude VAT. Purchase tax payable on retailer's stock prior to the second quarter of 1973.

3 The estimates are shown to the nearest £ million but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3 because of the margin of error involved in quarterly seasonal adjustments. Differences between totals and the sum of constituent parts are due to rounding.

r Revised. p Provisional.

1 The Index numbers of the level of stocks relate to the end of each quarter: the index of production refers to production during the quarter.

2 The 1970 index of production has been rebased on the fourth quarter of 1969 for the purpose of this table.

3 The index numbers of the stocks production ratio are calculated from unrounded estimates of the data in the previous two columns.

Revised. p Provisional.

Manufacturers' stocks in December

It is estimated that manufacturers' stocks rose by about £10 million at 1970 prices, seasonally adjusted, in December 1977. Stocks of materials and fuel and work in progress rose slightly, while there was a slight fall in stocks of finished goods.

Monthly figures from July 1977, adjusted to agree with the quarterly figures published opposite, are shown below:

	Stock changes £ million, 1970 prices seasonally adjusted
1977 July	—
August	−30
September	—
October	+20
November	−50
December	+10

Inquiries: 01-215 5215/3176.

Capital expenditure of manufacturing, distributive and service industries: fourth quarter

Provisional estimates of capital expenditure in the manufacturing, distributive and service industries for the fourth quarter 1977 will be published in the next issue of *Trade and Industry* (10 March).

Engineering industries: indices of production up to November

Provisional estimates for the index of production indicate a slight increase in output between the second quarter of 1977 and the period September to November. From the latest month's information, together with some revisions to earlier periods, it is clear that output over this period has continued at rather depressed levels for most industries. Apart from a few notable exceptions, mainly among the electrical industries, the overall trend of engineering production in the latest three months has so far failed to recover to the improved level achieved in the first quarter of 1977, which was partly associated in some industries with a temporary increase in sales in connection with the ending of development grants.

The slow growth since the middle of 1977, despite some recovery in UK plant and machinery investment, has still left the overall index of engineering production in September to November at about the low average level reached in 1976. Between the three engineering sectors, the mechanical engineering group of industries in recent months has continued to suffer from weak demand and had fallen 4 per cent below the 1976 average. Production of the electrical and instrument engineering sectors, however, had risen by 2 and 5 per cent respectively over the same time span, with all of the most recent increase coming from the electrical engineering side, where there was a recovery of nearly 5 per cent from the dip in the second quarter. Mechanical engineering output has yet to show any upturn in this cycle, apart from the temporary improvement in the first quarter of last year, and the trend of instrument engineering production is rising at best only slowly, with some variability over the quarterly path.

In the mechanical engineering sector, most industries showed lower deliveries between the second quarter and September-November 1977, with the compressors and fluid power equipment, textile, office, food processing and packaging machinery industries and constructional steelwork the main exceptions. There is no clear evidence that the moderately rising trends for these industries will continue. The industries in electrical engineering contributing to the recent modestly rising trend for the sector as a whole were mainly the high technology industries of electrical machinery, telecommunications and broadcasting equipment, computers and electronic capital goods.

These series of production at industry level were introduced in an article in *Trade and Industry*, 9 September 1977, whilst a run of annual indices of production together with an article on recent improvements to the series appeared in *Trade and Industry*, 10 June 1977.

Inquiries: On the article and the statistics: Mr I. P. Tutt, Branch EcS 3A, Department of Industry, Room 618, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 5770. Requests for quarterly indices for past years: Mr P. Coulson, Branch 5, Central Statistical Office, Great George Street, London SW1P 3AG, tel. 01-233 7239.

Indices of production for engineering industries

Seasonally adjusted volume ind ices

		1970 = 100				1976				1977			
MLH		Weight (percentage)	1974	1975	1976 p	1st qtr	2nd qtr	3rd qtr p	4th qtr p	1st qtr p	2nd qtr p	3rd qtr p	Sep-Nov average p[1]
3310	Agricultural machinery	1,05	132.2	113.7	109.2	107.2	104.6	107.7	117.4	114.4	95.0	106.7	111.1
3320	Machine tools	4.01	77.7	73.6	60.8	64.4	60.0	57.8	61.1	59.5	57.8	57.1	57.1 [2]
3331	Pumps	1.02	118.8	123.6	132.8	130.8	132.7	131.4	136.4	138.8	140.6	133.5	133.6
3332	Valves	1.49	104.4	106.6	98.8	96.6	96.4	96.4	105.8	107.6	98.5	102.4	102.6
3333/4	Compressors	1.85	116.4	109.0	103.7	102.7	105.0	101.4	105.8	109.1	106.8	111.7	116.9
3340	Industrial engines	1.61	108.6	125.6	128.0 r	132.6	135.3	121.4	122.8	147.4	139.6	137.7	136.6
3350	Textile machinery	2.25	111.3	111.7	75.2	89.0	79.0	68.4	64.6	55.7	47.1	49.2	52.7
3360	Construction equipment	2.82	120.2	127.8	125.7	125.6	130.3	123.6	123.2	142.9	122.8	120.8	121.4
3370	Mechanical handling equipment	3.47	106.7	116.2	104.6	105.0	105.0	104.0	104.4	109.4	105.0	104.4	102.9
3380	Office machinery	2.03	109.0	103.6	103.2	97.9	100.1	100.2	114.4	108.6	102.9	106.2	106.9
3391	Mining machinery	1.04	135.7	169.2	159.1	165.0	163.8	154.5	153.3	135.9	150.2	147.8	151.1
3392	Printing and paper machinery	1.02	93.4	83.9	76.0	73.9	75.1	81.4	73.7	78.8	75.0	74.0	72.8
3393/4	Refrigerating and space-heating machinery	2.32	104.5	99.2	93.4	93.3	91.1	93.7	95.3	97.1	93.0	90.1	88.6 [2]
3395/6	Weighing machinery and power tools	1.08	110.3	102.8	102.0	93.0	102.4	113.8	99.0	101.5	108.0	106.6	110.0
3397/8	Food processing machinery: packaging machinery	1.53	119.2	129.4	123.5 r	129.1	128.4	125.1	111.4	117.6	119.6	120.7	123.0
3399	Other non-electrical machinery	4.99	95.2	84.8	80.9	80.7	88.8	77.4	76.8	93.7	78.3	75.7	73.9
3414	Constructional steelwork	3.11	123.9	120.5	106.9	112.9	107.0	105.9	101.9	109.6	94.6	97.9	99.9
3415	Industrial plant and fabricated steelwork	7.92	88.3	88.0	86.5	91.8	84.8	88.5	80.8	75.9	80.3	81.8	79.7 [2]
3491	Ball, roller and plain bearings	3.17	115.2	109.9	107.7	103.3	108.7	107.9	110.8	108.3	108.6	107.8	107.0
	Other mechanical engineering	7.40	115.5	105.0	97.3	99.0	100.1	95.4	94.7	96.7	98.9	95.4	91.5
	Mechanical engineering	55.16	106.2	104.2	97.4	99.2	98.8	96.3	95.5	98.5	94.5	94.3	93.3
3510	Photographic and copying equipment	0.80	101.5	96.1	94.4	85.7	96.6	89.8	105.6	92.9	99.6	90.0	84.9
3520	Watches and clocks	0.53	141.8	144.7	129.3	129.4	123.7	129.0	135.0	120.9	116.2	134.7	134.5
3530	Surgical instruments	1.18	145.1	136.7	121.9	119.8	126.7	119.6	121.5	123.7	122.3	121.2	123.2
3540	Scientific and industrial instruments	5.69	112.2	115.5	112.6	109.5	113.5	110.4	117.2	113.5	119.8	117.4	117.1
	Instrument engineering	8.19	117.8	118.5	113.3	109.9	114.4	110.9	117.8	113.4	118.0	116.3	115.9
3610	Electrical machinery	7.25	93.0	97.9	95.2	94.2	95.9	95.3	95.3	99.7	98.8	102.1	105.2
3620	Wires and cables	2.91	110.0	93.5	95.4	90.7	95.0	95.6	100.4	103.4	97.5	98.8	97.2
3630	Telecommunications	3.28	117.5	114.4	100.4	109.2	106.2	96.8	89.3	83.8	81.3	85.5	86.4
3640	Electronic components	5.48	145.7	111.7	113.5	105.1	113.4	113.3	122.1	125.3	127.5	125.7	126.1
3651	Records and tapes	0.42	194.3	197.4	188.8	187.0	200.3	186.2	181.6	216.0	194.4	178.0	181.0
3652	Broadcasting equipment	2.75	198.8	168.5	156.5	137.0	147.3	165.3	176.4	149.4	133.1	159.6	163.6
3660	Computers	1.43	135.0	158.8	166.1 r	169.6	157.5	169.8	175.5	179.0	184.2	211.4	210.5 [2]
3670	Electronic capital goods	4.30	93.4	97.1	101.6	97.6	100.5	103.7	104.4	109.8	107.4	111.7	110.7
3680	Domestic, electrical appliances	2.99	143.4	134.4	123.1	117.7	113.6	130.4	130.5	139.1	112.4	123.4	126.0
3691	Electric parts for vehicles	1.90	120.6	95.8	96.7	98.5	98.1	94.8	95.5	96.8	100.2	84.0	81.8
3692/3	Batteries	1.46	119.0	117.2	117.7	121.0	126.9	114.4	108.5	123.7	106.2	111.8	117.6
3694	Lamps and other electrical	2.50	104.8	97.2	93.4	91.8	94.2	93.5	94.0	97.9	97.1	94.7	92.6
	Electrical engineering	36.65	122.6	113.4	110.8	107.5	110.0	111.8	113.7	115.6	110.8	115.1	115.9
	Combined engineering	100.00	113.1	108.7	103.6	103.1	104.2	103.2	104.0	106.0	102.4	103.8	103.4

[1] Averages for other than a calendar quarter should not be compared with those in the preceding column; the estimates are not independent and are subject to erratic variation and later revisions. Comparisons with earlier quarters provide more reliable guides to recent trends. [2] The figure shown is the average for August to October; later figures not available owing to insufficient response. r Revised to incorporate later information from industry. p Provisional.

Motor vehicle production in January

Production of cars in the four weeks ending 28 January of 111 449 units (27 862 per week) was 7 per cent below the January 1977 level. Production for the home market rose by 2 per cent while that for export fell by 19 per cent.

Production of commercial vehicles of 31 113 units (7778 per week) was 9 per cent below January 1977 level. Production for the home market fell by 3 per cent while that for export fell by 15 per cent.

The summaries which follow are based on the revised seasonally adjusted figures shown in table 2.

Cars

Car production in January of 112 000 units was 2 per cent above the monthly average for 1977. Production for the three months November to January was also 2 per cent above the preceding three months. Production for the home market rose by 1 per cent while that for export rose by 5 per cent.

Commercial vehicles

Commercial vehicles production in January of 33 500 units was 1 per cent above the monthly average for 1977. In the three months November to January, output fell by 6 per cent compared with the preceding three months. Output for the home market fell by 4 per cent while that for export fell by 8 per cent.

To ensure consistency of treatment, Land-Rover estate vehicles are now being recorded as commercial vehicles rather than as passenger cars. Figures for 1977 have been revised to this basis. The number of such vehicles in 1977 was 11 848.

Inquiries: 01-212 9788

Table 1 Car and commercial vehicle production

Production figures of road motor vehicles cover complete vehicles, chassis with engines for delivery as such and unassembled vehicles for export. Road tractors are included but battery-operated road vehicles are excluded.

	No of weeks	Passenger cars (including taxis)				Commercial road vehicles			
		For home market	For export	Totals	Weekly average	For home market	For export	Totals	Weekly average
1969	53	892 758	824 315	1 717 073	32 398	272 998	192 778	465 776	8 788
1970	52	918 109	722 857	1 640 966	31 557	267 407	190 125	457 532	8 799
1971	52	1 027 462	714 478	1 741 940	33 499	268 278	187 928	456 206	8 773
1972	52	1 307 881	613 430	1 921 311	36 948	272 649	135 470	408 119	7 848
1973	52	1 142 216	605 105	1 747 321	33 602	257 574	159 049	416 623	8 012
1974	52	937 932	596 187	1 534 119	29 502	232 373	170 193	402 566	7 742
1975	52	735 532	532 164	1 267 696	24 379	194 319	186 386	380 705	7 321
1976	53	768 481	564 968	1 333 449	25 159	182 554	189 503	372 057	7 020
1977	52	753 195	562 777	1 315 972	25 307	201 445	196 823	398 268	7 659
1977									
1st qtr	13	180 813	149 558	330 371	25 413	51 826	57 676	109 502	8 423
2nd	13	209 665	161 386	371 051	28 542	49 299	51 945	101 244	7 788
3rd	13	166 116	104 554	270 670	20 821	44 036	41 832	85 868	6 605
4th	13	196 601	147 279	343 880	26 452	56 284	45 370	101 654	7 820
1977									
January	4	66 119	54 069	120 188	30 047	16 932	17 402	34 334	8 584
February	4	49 573	46 109	95 682	23 921	15 376	17 822	33 198	8 300
March	5	65 121	49 380	114 501	22 900	19 518	22 452	41 970	8 394
April	4	64 475	48 998	113 473	28 368	13 394	16 133	29 527	7 382
May	4	80 099	60 057	140 156	35 039	18 860	20 020	38 880	9 720
June	5	65 091	52 331	117 422	23 484	17 045	15 792	32 837	6 567
July	4	47 156	27 939	75 095	18 774	13 007	14 020	27 027	6 757
August	4	51 565	27 605	79 170	19 793	12 628	10 869	23 497	5 874
September	5	67 395	49 010	116 405	23 281	18 401	16 943	35 344	7 069
October	4	55 346	47 810	103 156	25 789	19 283	14 863	34 146	8 537
November	4	63 333	49 199	112 532	28 133	18 198	12 807	31 005	7 751
December	5	77 922	50 270	128 192	25 638	18 803	17 700	36 503	7 301
1978									
January	4	67 488	43 961	111 449	27 862	16 396	14 717	31 113	7 778

Note: From January 1978, Land-Rover estate vehicles are being recorded as commercial vehicles rather than as passenger cars. Figures for 1977 have been revised on to this basis. The number of these vehicles in 1977 was 11 848.

Table 2 Production seasonally adjusted

Monthly average — Thousands

	Passenger cars			Commercial vehicles		
	For home market	For export	Total	For home market	For export	Total
1969	74	69	143	22.7	16.1	38.8
1970	77	60	137	22.3	15.8	38.1
1971	86	59	145	22.3	15.7	38.0
1972	109	51	160	22.7	11.3	34.0
1973	95	50	145	21.5	13.2	34.7
1974	78	50	128	19.3	14.2	33.5
1975	61	45	106	16.2	15.5	31.7
1976	64	47	111	15.2	15.8	31.0
1977	63	47	110	16.8	16.4	33.2
1977						
1st qtr	56	49	105	16.2	18.6	34.8
2nd	67	50	117	16.1	16.3	32.4
3rd	67	42	109	17.4	16.5	33.9
4th	61	47	108	17.5	14.3	31.8
1977						
January	63	58	121	17.6	19.1	36.7
February	52	47	99	15.4	17.9	33.3
March	54	43	97	15.6	18.6	34.2
April	70	52	122	14.6	17.6	32.2
May	69	53	122	18.1	17.8	35.9
June	63	45	108	15.7	13.5	29.2
July	64	41	105	16.8	16.6	33.4
August	66	36	102	17.6	16.7	34.3
September	70	50	120	17.8	16.1	33.9
October	55	48	103	18.1	15.2	33.3
November	58	46	104	17.1	12.8	29.9
December	70	46	116	17.1	15.0	32.1
1978						
January	65	47	112	17.2	16.3	33.5
Average of						
Aug-Oct 1977	64	44	108	17.8	16.0	33.8
Nov 1977-Jan 1978	65	46	111	17.1	14.7	31.8
Percentage change	+1	+5	+2	−4	−8	−6

Notes to table 2: The seasonally adjusted series has been adjusted to exclude the effect of regularly recurring influences (eg holidays) but the figures still reflect the effect of factors that do not recur regularly (eg strikes).

Care should be taken not to interpret changes between one month and another as necessarily indicating the underlying trend. The averages in the latest three months and the previous three months give a more reliable guide to recent changes.

Index of industrial production for Wales: corrections

Postal difficulties caused by bad weather delayed proofs of the index of production for Wales for the third quarter 1977 from reaching Cardiff. Corrections should be made to the tables published on 24 February, pages 446-7, as follows:

Table 1
Delete small figure 1 from heading.
Coal and petroleum products, 1975 fourth quarter: delete 95, and substitute 94.

Ferrous industry, 1974 first quarter: delete 86, substitute 76.

Timber, furniture etc, 1972 fourth quarter: delete 143, substitute 142.

Paper, printing and publishing, 1970 third quarter: delete 03, substitute 93.

Gas, electricity and water: 1974 second quarter: delete 160, substitute 150.

Table 2
1977 third quarter: add p.

Add the following footnotes:
[1] The construction industry (weight 146) is excluded from this analysis.
p Provisional. Small revisions to the series (going back to the start of the previous year) are normally made each quarter to take account of both more recent information and improved seasonal adjustment factors. The series from the first quarter 1970 to the fourth quarter 1975 will not be revised.

Do you use statistics?

The Government Statistical Service (GSS) prepares a wide range of reliable and detailed figures on the United Kingdom. It is usually worth checking to see if what you want is available from them. You can see many government statistical publications at your local public library, buy them from HMSO, or refer to the comprehensive collection held at the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4N 7HU (tel. 01-248 5757 ext. 368).

Unemployment and vacancies: provisional figures for mid-February

Unemployed persons in Great Britain on 9 February numbered 1 445 863 representing 6.2 per cent of total. The total includes 46 634 school leavers under 18 not yet employed.

The seasonally adjusted series shows that the number of unemployed in Great Britain excluding the school leavers was 1 350 200 (5.8 per cent of all employees), a decrease of 10 800 since 12 January. In the last three months there has been a decrease on average of 7600 a month.

Of the total unemployed in Great Britain 202 000 had been unemployed for four weeks or less. It is estimated that about 1 115 000 were unemployed for more than four weeks, and were aged under 60.

The average number joining the unemployment register in the three months ending January was 358 000 per month compared with 386 000 in the three months ending October and 389 000 in the three months ending July 1977. The average numbers leaving the register in these three periods were 357 000, 379 000 and 373 000 per month respectively.

Inflow of vacancies

The average inflow of vacancies in the three months ending January was 195 000 per month compared with 199 000 in the three months ending October and 192 000 in the three months ending July 1977. The average outflows in the three periods were 185 000, 198 000 and 196 000 per month respectively.

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Business Monitors in the production series and miscellaneous series, and certain monitors (nos. SD 1 to SD 9) in the service and distributive series, are available by annual subscriptions from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH.

Cost indices for the aerospace and radio, radar and electronic capital goods industries

December's figures are given below. Attention is drawn to the footnotes: an explanation of the compilation of the indices was given in the introductory article in *Trade and Industry* on 3 February.

Cost indices for the aerospace and radio, radar and electronic capital goods industries (MLH 383 and 367 respectively)

1970 = 100

	1976	1977											
	Dec p	Jan p	Feb p	Mar p	Apr p	May p	Jun p	Jul p	Aug p	Sep p	Oct p	Nov p	Dec p
1 BOUGHT OUT FINISHED GOODS													
Aerospace industry	246.5	250.0	251.6	254.6	256.1	259.2	259.3	261.7	262.1	264.2	267.3	272.3	273.3
Airframe sector	242.5	245.9	247.5	250.6	251.9	254.9	254.8	257.3	258.4	259.9	263.1	268.2	269.4
Aero-engine and aero-engine parts sector	249.4	253.1	254.7	257.7	259.2	262.5	262.7	265.4	265.3	267.9	270.9	275.3	276.3
Aero-engine parts sector	243.1	247.2	249.1	252.2	254.0	256.7	257.4	260.4	262.3	264.0	267.4	270.6	272.3
Aircraft component sector	251.5	255.3	256.9	260.0	261.4	264.5	264.6	267.2	267.0	269.4	272.1	276.3	277.2
2 OTHER PURCHASED MATERIALS													
Aerospace industry	299.3	304.5	307.2	309.9	309.9	310.2	309.9	313.5	315.2	318.3	319.8	317.5	317.3
Airframe sector	278.6	283.0	285.9	289.1	289.9	290.7	292.0	297.3	301.2	303.4	304.8	303.1	303.7
Aero-engine and aero-engine parts sector	295.6	300.4	303.8	305.0	305.0	305.1	304.9	307.9	310.2	315.6	318.9	317.6	317.6
Aero-engine parts sector	318.0	324.1	326.5	329.0	328.6	328.8	327.6	330.3	330.5	333.8	335.2	332.4	331.7
Aircraft components sector	308.2	314.2	316.7	320.0	319.6	319.8	318.9	322.2	322.7	324.0	324.3	321.0	320.7
3 ALL PURCHASES OF GOODS													
Aerospace industry	263.9	268.0	269.9	272.9	273.8	276.0	276.0	278.8	279.6	282.1	284.6	287.2	287.9
Airframe sector	250.8	254.4	256.3	259.4	260.7	263.1	263.4	266.5	268.3	269.9	272.7	276.2	277.3
Aero-engine and aero-engine parts sector	266.0	270.1	272.1	274.7	275.7	277.8	277.9	280.7	281.4	285.0	288.2	290.5	291.2
Aero-engine parts sector	273.4	278.3	280.4	283.3	284.2	285.9	285.8	288.7	289.9	292.2	294.8	295.6	296.3
Aircraft components sector	284.9	290.0	292.1	295.3	295.7	297.1	296.6	299.6	299.8	301.6	302.8	302.6	302.8
Radio, radar and electronic capital goods industry	239.7	243.9	246.9	250.5	252.7	256.3	256.9	259.2	261.0	262.1	264.5	268.7	269.6
4 SALARIES AND GENERAL EXPENSES													
Aerospace industry	242.1	245.3	245.8	248.0	249.7	253.7	253.7	255.6	253.8	256.2	258.7	264.5	265.1
Airframe sector	240.8	243.8	244.1	246.3	247.8	252.0	251.8	253.6	251.6	254.2	256.8	262.9	263.6
Aero-engine and aero-engine parts sector	247.0	250.8	251.3	253.3	255.2	259.3	259.3	261.1	259.5	261.9	264.2	269.8	270.4
Aero-engine parts sector	239.9	243.2	244.1	246.3	248.2	252.1	252.4	254.4	253.0	255.4	257.8	263.3	263.9
Aircraft components sector	237.5	240.4	240.8	243.0	244.6	248.5	248.4	250.2	248.3	250.7	253.2	259.1	259.7
Radio, radar and electronic capital goods industry	224.2	225.8	226.5	229.5	230.1	231.9	230.6	231.7	233.3	233.5	236.2	247.5	248.0
5 HOURLY EARNINGS OF ADULT MANUAL WORKERS													
Aerospace industry	249.7	250.8	251.3	254.5	254.2	259.4	258.1	260.3	256.5	260.2	263.8	273.1	273.8
Radio, radar and electronic capital goods industry	271.8	270.7	272.0	278.3	278.1	280.0	277.3	278.8	281.1	281.9	286.2	304.5	305.1
6 COMBINED COSTS													
Aerospace industry	252.4	255.5	256.5	259.2	260.2	263.8	263.4	265.8	264.5	267.3	270.0	275.4	276.0
Airframe sector	246.4	249.2	250.1	252.9	253.8	257.7	257.4	259.7	258.7	261.2	264.1	270.0	270.9
Aero-engine and aero-engine parts sector	254.8	258.0	259.1	261.6	262.6	266.2	266.0	268.2	267.0	270.1	273.1	278.3	279.0
Aero-engine parts sector	253.0	256.1	257.2	259.9	260.8	264.5	261.2	266.5	265.1	267.9	270.7	276.1	276.7
Aircraft components sector	255.9	258.9	259.8	262.6	263.2	266.8	266.2	268.5	266.6	269.2	271.7	276.9	277.4
Radio, radar and electronic capital goods industry	239.3	241.6	243.5	247.3	248.5	251.2	250.5	252.3	254.1	254.8	257.6	266.8	267.5

Definitive information on earnings for both manual and administrative, technical and clerical (ATC) workers is available only for certain months of the year – manual earnings information is available for MLH 383 for April and October but for MLH 367 in respect of October only; ATC salaries information for both industries is available for April of each year.

The indices of combined costs are based on the assumption of no change in productivity.

Revisions to series brought about as a result of ATC salaries information becoming available will be shown in the article published on 8 December and will affect indices from May the preceding year up to and including those of August.

Revisions to series incorporated as a result of manual earnings information from the October survey will be published in the article appearing on 7 April and will affect series from the preceding May up to and including December. The results obtained from the April aerospace survey will affect indices from the preceding November up to and including June and will be shown in the article published on 6 October.

The cost index tables previously D1-D5 and D7 have now been redesignated sections 1 to 6 in the table.

p Provisional.

Copies of specific issues (including back issues) can be ordered by post (payable in advance) from the library at the Business Statistics Office, Newport, Gwent NPT 1XG, tel. 0633 56111, ext. 2973; telex 497121 – answer back BSONPT G, from which a complete list of the titles of Business Monitors is available on application.

Cinema admissions and takings in November

During November, counted as a four-week period, the weekly average of admissions to cinemas in Great Britain was 1.99 million and the weekly average of gross box office takings was £1.69 million. The comparable figures for November 1976 were £1.88 million and £1.42 million.

Films Act 1960: combination of quota periods – 'Star Wars'

The Department of Trade, after consulting the Cinematograph Films Council and upon the application of EMI Cinemas Ltd, has issued a direction that for the following cinemas the years 1978 and 1979 may be combined as a single quota period, provided that the foreign film 'Star Wars' is exhibited for a continuous period of at least eight weeks and one day.

ABC 1, Sidcup, Kent; Commodore, Orpington, Kent; and Astoria 1, Purley, Surrey.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 24 February 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Holocaust 2000	BR/E 39485C/26/2/83	100	20 February	Rank Film Distributors Ltd	Aston Films Ltd, London and Embassy Production SpA, Rome
Echoes	BR/E 39493/26/2/83	23	23 February	Cinema International Corporation (UK)	Viscom Production Ltd
The Contraption	BR/E 39494/26/2/83	8	23 February	GTO Films (Distributions) Ltd	James Dearden
Movietone News 2542	BR/E 39390/26/2/83	8	24 February	British Movietonews Ltd	British Movietonews Ltd
COMMUNITY					
Pardon Mon Affaire	EC 39486/26/2/83	105	20 February	Curzon Film Distributors Ltd	Productions de la Gueville and Gaumont, Paris
FOREIGN					
Confessions Of A Frustrated Housewife	F 39488	91	22 February	S Film Enterprises Ltd	Capitol International Rome
Empire Of The Ants	F 39489	85	22 February	Brent Walker Film Distributors Ltd	American International Pictures, California
Revenge Of The Dead	F 39490	88	22 February	Brent Walker Film Distributors Ltd	Group 1, California
The Terror Of Dr Chaney	F 39491	88	22 February	Brent Walker Film Distributors Ltd	Group 1, California
You Light Up My Life	F 39492	91	22 February	Columbia-Warner Distributors Ltd	The Session Co, New York
Swept Away	F 39495	120	23 February	GTO Films (Distributions) Ltd	Medusa Distribuzione SRL, Rome

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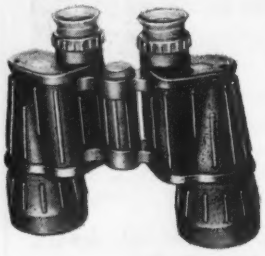

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